

final report

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Project Voodoo – Future of the Butcher

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APPRENTICESHIPS - WHAT KIND OF BUTCHER DO WE WANT TO CREATE?

A VISION OF THE FUTURE

DISCUSSION AND CONCLUSIONS



BACKGROUND

MEAT & LIVESTOCK AUSTRALIA (MLA) IS A SERVICE COMPANY THAT INVESTS IN MARKETING AND RESEARCH AND DEVELOPMENT ON BEHALF OF ITS 47,500 BEEF, LAMB AND GOAT PRODUCER MEMBERS

WITH THE RECENT DECLINE IN THE MARKET SHARE OF INDEPENDENT BUTCHERS AND, AS THE MLA SPENDS A LARGE PROPORTION OF ITS INVESTMENT IN BELOW THE LINE ACTIVITIES THROUGH INDEPENDENT BUTCHERS THE MLA HAS DECIDED TO ASSESS WHAT THE BEST WAY FORWARD WOULD BE FOR THE INDEPENDENT BUTCHERS CHANNEL

THE MLA HAS BEEN ENGAGING WITH BUTCHERS VIA A SPECIAL BUTCHER CLUB, WHICH WAS CALLED THE RED MEAT NETWORKING CLUB, BUT HAS RECENTLY BEEN RE-BRANDED AS THE AUSTRALIAN BUTCHERS' GUILD. MEMBERSHIP IS VOLUNTARY, AND MEMBERS RECEIVE SPECIAL OFFERS AND SUPPORT FROM MLA MARKETING

THE MLA WOULD LIKE TO GAIN A DEEPER UNDERSTANDING OF THE CHALLENGES HAVE BEEN PRESENTED TO BUTCHERS THAT MAY HAVE IMPACTED THE BUTCHER CHANNEL'S DECLINE IN SHARE IN ADDITION TO EXPLORING THE HYPOTHESIS THAT AGGRESSIVE PRICING FROM LARGE RETAILERS IS A MAJOR CULPRIT OF INDEPENDENT BUTCHERS DECLINE

THE MLA ASKED FATHOM AND MUSTARD TO EXPLORE THESE ISSUES AND THIS DOCUMENT ADDRESSES THE FINDINGS OF THE STUDY



OBJECTIVES (FROM BRIEF)

MAIN OBJECTIVE: TO FIND OUT HOW BUTCHERS HAVE BEEN FARING AND HOW THIS IS LIKELY TO EVOLVE IN THE NEAR FUTURE. WHAT HAVE BEEN THE KEY AREAS OF IMPACT ON THEIR BUSINESS?

DETAILED OBJECTIVES:

WHAT HAVE BUTCHERS EXPERIENCED RECENTLY IN THE RETAIL INDUSTRY?

WHAT HAS IMPACTED ON THEIR BUSINESS OVER THE PAST DECADE E.G.: OPERATIONAL COST INCREASES (RENT, INSURANCE AND GENERAL OVERHEADS ETC.), AVAILABILITY OF SUITABLY QUALIFIED STAFF, STATE FOOD CONTROL LEGISLATIVE CHANGES ETC.

WHAT DO THEY EXPECT TO HAPPEN NEXT?

WHAT ARE THEY DOING ABOUT IT?

WHAT DO THEY THINK THE ROLE OF BUTCHERS WILL BE IN THE FUTURE? IS THAT DIFFERENT FROM THE CURRENT SITUATION? IF SO, HOW?

CONFIDENCE TO RE-INVEST IN THEIR BUSINESS — CHANGES IN LOCATION, STORE LAYOUT OR OTHER AREAS OF OPPORTUNITY THEY MAY SEE AS VIABLE OPTIONS

HOW DO THEY SEE BUTCHER AND SUPERMARKET SHARE INTO THE FUTURE SAY 2020 AND BEYOND

HOW DO THEY PERCEIVE MLA? AND WHAT DO THEY THINK MLA SHOULD DO TO SUPPORT THEM?

WHAT ARE THEIR PERCEPTIONS OF THE AUSTRALIAN BUTCHERS' GUILD?

WHAT SHOULD THE AUSTRALIAN BUTCHERS' GUILD OFFER BUTCHERS IN AN IDEAL SITUATION? IS THAT REALISTIC?



SAMPLE AND TIMING

A TOTAL OF 34 RESPONDENTS TOOK PART IN THE STUDY

A SELECTION OF RETAIL BUTCHERS FROM MORE GOURMET,
TO EVERYDAY TO BULKY

A SELECTION OF INDUSTRY THOUGHT LEADERS AND SUPPLIERS

A SAMPLE OF APPRENTICES

INTERVIEWS TOOK PLACE IN JUNE 2014

ACROSS EASTERN AUSTRALIA:

MORNINGTON PENINSULA, MELBOURNE, SYDNEY AND SUBURBS,
GOLD COAST, BRISBANE AND SUBURBS & HERVEY BAY



THE SITUATION



A TRADE IN DECLINE

THE NUMBERS DEMONSTRATE THAT THE TRADE IS IN TROUBLE — EVERYBODY KNOWS THIS
AND, ALTHOUGH WE CAN EXPLORE THE EXTERNAL FACTORS AT PLAY WE MUST ALSO LOOK AT INTERNAL
FACTORS IN THE INDUSTRY AND WITH THE BUTCHERS THEMSELVES

IN DOING SO THERE HAS TO BE AN HONESTY

IT SHOULDN'T BE ABOUT BLAME OR TOLD YA SO'S

IT SHOULD BE ABOUT ACKNOWLEDGING ISSUES

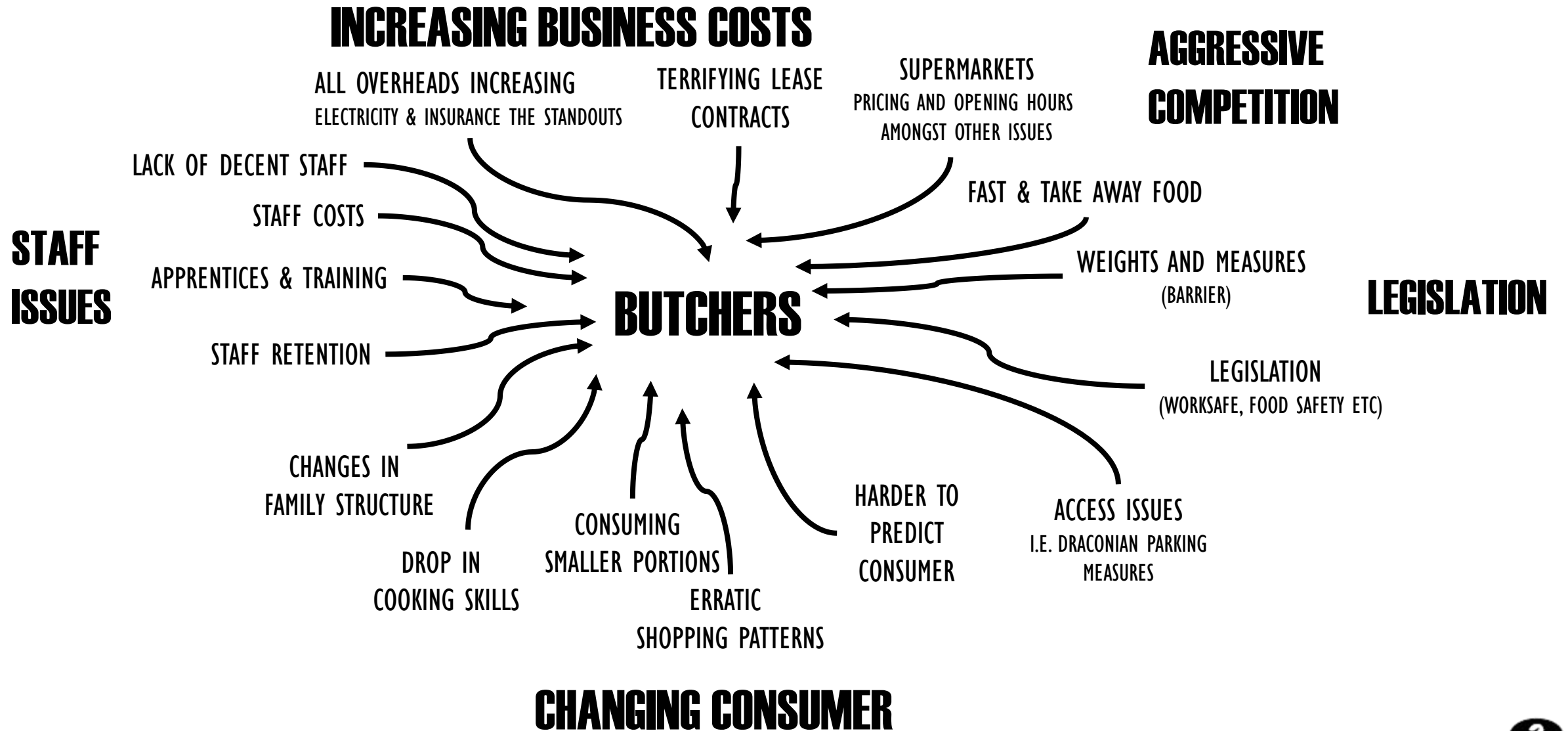
AND, FOR THE GOOD OF THE INDUSTRY AS A WHOLE, TAKING STEPS COLLECTIVELY TO ADDRESS THEM

MOVING FORWARD THE INDUSTRY MUST THINK COLLABORATION NOT COMPETITION

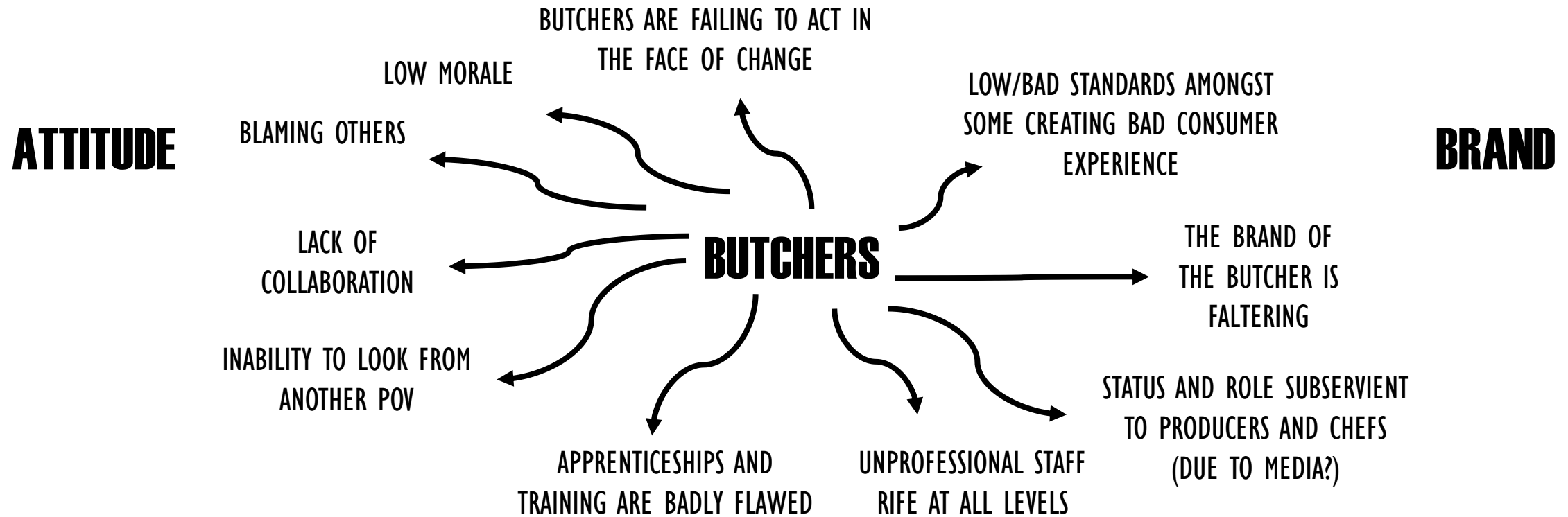
*“The problem is when you get a loads of butchers in a room together it becomes a competition to see
who can piss higher up the wall” Thought Leader*



PRESSURE COMES FROM ALL DIRECTIONS



BUT OTHER REASONS FOR DECLINE COMES FROM WITHIN...



AN ATTITUDINAL 'ROT' OF SORTS SEEMS TO HAVE SET WITHIN THE INDUSTRY – TOO MANY ARE WILLING TO ACCEPT OR PERPETUATE UNPROFESSIONAL BEHAVIOUR OR LOW STANDARDS

THESE ISSUES IN ADDITION TO OTHER EXTERNAL FACTORS THWART THE INDUSTRY AS WHOLE FROM STEPPING UP TO REMAIN COMPETITIVE



THE SITUATION - INCREASING BUSINESS COSTS

EVERYTHING IS GOING UP!

STAFF WAGES, PAYROLL TAXES, INSURANCE AND ELECTRICITY CAME UP MOST OFTEN IN DISCUSSION WHEN TALKING ABOUT BUSINESS COSTS

MANY JUST PUT ON AN IRRITATED BUT STOIC FACE — FOR THE MOST PART THEY ARE COSTS THEY CANNOT DO ANYTHING ABOUT

HANDLING MONEY WITH REGARD TO WAGES DID OCCASIONALLY COME UP NEGATIVELY

SOME BUTCHERS ACCUSING OTHERS OF DODGING PAYROLL TAX BY PAYING FOR SOME WAGES OFF THE BOOKS AND OTHERS NOT RESPECTING PENSION RIGHTS

“There are plenty of things that effective business you just can’t do anything about”

“Power is a killer. We run all these fridges and cool rooms. It’s just astronomical”

“Even though I signed a fixed premium for 5 years contract they seem to find ways to put insurance premiums up”

“I do everything above board but I know there are people out there avoiding paying some of the payroll tax. That gives them better margins”



THE FEAR OF THE SHOPPING CENTRE

ALTHOUGH SOME BUTCHERS CAN DO WELL IN SHOPPING CENTRES THEY ARE ABSOLUTELY FRAUGHT WITH DANGER

PARTICULARLY FOR THE GREEN/NEW BUTCHER

THE LANDLORDS TRY AND ENFORCE A UNIFORMITY OF DESIGN THAT MIGHT NOT WORK FOR ALL RETAILERS

THE LANDLORDS WILL BULLY POTENTIAL TENANTS

THE LANDLORDS WILL CREATE VERY TIGHT CONTRACTS THAT NEED SIGNIFICANT EXPERTISE TO NAVIGATE AND PROTECT ONESELF AGAINST

THE RENTS ARE OFTEN UNREALISTIC

“If you haven’t got the right lease, rental structure and total occupancy costs sorted out properly you are doomed before you have even started. You can be the best butcher, a great colourful offer, but if that foundation is wrong you won’t make it”

“A lot of people get it wrong when it comes down to what they can afford for rent. The landlords get the estimates wrong and a lot of the retailers get it wrong”

“These guys will bully you. Westfields, GPT, Collonial, Leandlease it doesn’t matter who, they will bully you. They know a lot about retail but they don’t know how each type of retail works so they will suggest things that don’t work. And if that green butcher goes in there and speaks to their designer he might think he knows what he’s talking about and follow their advice and do whatever they recommend”



IT IS EXTREMELY DOUBTFUL A NEW OPERATOR LACKING GOOD SUPPORT AND ADVICE CAN NAVIGATE THE ISSUES OF A SHOPPING CENTRE WITHOUT SIGNIFICANT PROBLEMS

EVEN WHEN YOU KNOW YOUR STUFF YOU HAVE TO FIGHT FOR EVERY SINGLE THING

SO THE PROCESS IS LONG AND HARD

AND ALTHOUGH YOU CAN TAKE STEPS WHEN MOVING IN TO LOOK AT THE MIX OF STORES AND COMPETITION THIS COULD CHANGE RAPIDLY

NOTE: IN QLD MANY RESPONDENTS FELT PARTICULARLY WORRIED ABOUT GOING INTO SHOPPING CENTRES THOUGH IT WAS DIFFICULT TO PINPOINT A STATE SPECIFIC REASON

“So these centres might say no you can’t have a TV and I say no it’s part of my corporate image. They say ok but no bigger than a 32” and I say no they have to be 50”. And then they say we want the lighting to our green standards for sustainability. And I say no, no, I say I want it to the building code and if you look under that code in section two you’ll see that if I don’t have lights in my cabinet I’m allowed to have as much light as I want from above. Well it took a month and almost ended up at Vcat but we got the lights we wanted. Now we have experience in this. We do it on a day-to-day basis, let me tell you if some butcher comes in to one of these shopping centres and has never done it before they will be broke before they have even opened the doors”

“And the problem is some guys think they know it all. They won’t listen to someone who really knows about retail”



LEGISLATION: WEIGHTS AND MEASURES, FOOD SAFETY ETC

WEIGHTS AND MEASURES LEGISLATION SEEMS TO CREATE A BARRIER FOR SOME CONSUMERS

LEGISLATION VARIES STATE TO STATE

TRYING TO UNDERSTAND THE COST OF A UNIT WHEN COST PER KILO IS QUOTED PUTS SOME CONSUMERS UNDER PRESSURE AND POTENTIAL EMBARRASSMENT

SUPERMARKETS ARE MUCH EASIER TO NAVIGATE THAN BUTCHERS FROM A COST PER UNIT PERSPECTIVE

SOME BUTCHERS GETTING ROUND IT BY SELLING PRE-PACKED MEAT
OTHERS USE "APPROXIMATE" LABELS
MANY DO NOTHING

FOOD SAFETY REGULATIONS AND THE TIGHTENING OF THEM IN VICTORIA HAVE DEFINITELY INFLUENCED CHANGES IN SOME BUTCHERS OPERATIONS
AND SOME QLD BUTCHERS REALISE THEY HAVE IT LUCKY IN COMPARISON TO STRICT VIC

"I think some people are embarrassed to ask how much a steak costs...so they shop at a supermarket...and at a butchers they might know you so you don't want to embarrass yourself"

"In Melbourne in Sydney you can sell things like a cutlet by each but you can't in QLD....so weights and measures holds us back"

"I used to do my own smoking but the testing involved! I once had this positive sample for something and it was no end of trouble and it turned out it was a mistake at the lab. It wasn't even my fault. I don't bother now. I send it out for someone else to smoke" VIC butcher

"We do our own smoking and if we had to send off samples as much as they do down in Victoria we wouldn't do it" QLD butcher



THE SITUATION - STAFFING ISSUES



STAFFING ISSUES

A HUGE PROBLEM FOR EVERY SINGLE BUTCHER INTERVIEWED

LACK OF 'GOOD' STAFF

AND BY GOOD MANY JUST MEAN SOMEBODY WHO HAS BUTCHERING SKILLS AND CAN ACTUALLY MANAGE SOME SORT OF CUSTOMER SERVICE!

LOW BEHOLD YOU OWN MULTIPLE SHOPS AND WANT TO FIND GOOD MANAGERS

THIS IS HOLDING BACK THE BETTER OPERATORS FROM EXPANSION

WHEN YOU FIND THEM RETAINING GOOD STAFF VERY HARD

YOU HAVE TO PAY TOP DOLLAR & GIVE WORK-LIFE BALANCE

"I had this great kid, really great, I spent a couple of years grooming him, he was going to be a future manager and then he day he came in and quit. I lost him to the mines"

MANY BUTCHERS HAVE SIMPLY GIVEN UP ON THE HOLY GRAIL OF SOMEBODY WHO IS A GOOD BUTCHER AND GOOD WITH CUSTOMERS - INCREASINGLY MANY ARE EMPLOYING DEDICATED FRONT OF SHOP SALES STAFF AND KEEPING THE BUTCHERS OUT BACK



STAFFING ISSUES

TOO MANY DODGY BUTCHERS OUT THERE

IN THE PAST PERHAPS WORD GOT ROUND ABOUT THE GUYS WITH THEIR HANDS IN THE TILL BUT NOW WITH BUTCHERS BEING THIN ON THE GROUND THESE GUYS ARE STILL GETTING WORK

THESE INDIVIDUALS EXERT ADDITIONAL PRESSURES ON RETAIL BUTCHERS

IMAGINE WHAT ELSE THEY ARE UP TO AND IMAGINE THE QUALITY OF TRAINING THEY GIVE APPRENTICES?!

“I had lots of problems in my shop. And I couldn’t quite catch them. So I installed 16 cameras. It cost me a fortune but the problems stopped right there and then”

EMPTY APPRENTICESHIPS

KIDS DON’T WANT TO BECOME BUTCHERS — A SURE SIGN THE BRAND

OF THE BUTCHER IS TARNISHED

AND VERY POOR STANDARD OF APPLICANTS

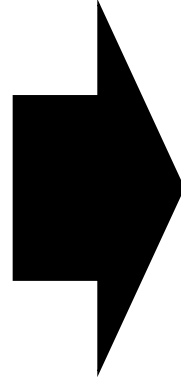
LOW QUALITY STAFF ARE AN ON-GOING HANDICAP FOR ANY RETAIL BUTCHER TRYING TO CARVE OUT A DECENT OPERATION. THE NEXT GENERATION OF APPRENTICES WILL BE KEY FOR THE SURVIVAL OF THE INDUSTRY



THE SITUATION - CONSUMER



EVERYTHING HAS CHANGED!



YOU NAME IT: ATTITUDES, FAMILY SIZE & STRUCTURE, AGE OF STARTING A FAMILY, DISPOSABLE INCOME, MEDIA EXPOSURE, ROLES AND RESPONSIBILITIES, EDUCATION, COMMUNICATIONS, LEISURE TIME, WORKING STYLES, COOKING ABILITIES, TRENDS, FADS AND FOIBLES ETC ETC

IT DOESN'T TAKE A GENIUS TO WORK THIS OUT – LIKewise IT SHOULDN'T TAKE ONE TO UNDERSTAND YOU MUST ADAPT TO YOUR CHANGING CUSTOMER

YET IT APPEARS MANY BUTCHERS ARE NOT WILLING TO DO THIS



THE CONSUMER INFLUENCES

“When Costco opened in Brisbane the amount of free advertising they got on every news outlet was ridiculous but the only time you see and independent butcher on the news is for a bad story”

“I put my guys in uniforms and it’s quite upmarket. I think some people might find it a bit intimidating at first. But that’s ok, they can go to Coles. I need this shop to be completely different to Coles”

“They did a recipe with beef cheeks on Masterchef and it was almost all anyone wanted that week. I wish I’d known”

MEDIA DRIVEN

TRENDS & FADS

COOKING SHOWS
& MAGS

PERCEPTION OF BUTCHER

INTEREST & EXCITEMENT

ANIMAL WELFARE

SUPERMARKETS

ONLINE SHOPPING

BUYING MEAT

FOOD SCARES

KNOWLEDGE & INFORMATION DRIVEN

LIFESTYLE DRIVEN

TIME POOR

PROVENANCE NATURAL

SOLUTIONS

BUDGETS

ALLERGIES

FARMER’S
MARKETS

LOCAL

FAST FOOD

TAKE AWAYS

PORTION SIZES

“They still do the stock ups every now and then but a lot more of it is bits and pieces. They buy a lot more just for a night or two now”

“One of the best things for me was a local naturopath telling mums they should feed their kids grass fed beef”

HEALTH & WELLBEING DRIVEN



KEY CHANGES: FOOD IS NOW ENTERTAINMENT

FOOD RELATED MEDIA HAS CREATED AN
EXCITEMENT AND INTEREST IN FOOD



MORE CURIOUS AND SOMETIMES MORE ADVENTUROUS



CONSUMER DESIRE FOR NEW FLAVOURS & EXPERIENCES



THEY WANT EXCITEMENT IN THEIR FOOD



MY KITCHEN RULES



KEY CHANGES: THEY CARE WHERE IT COMES FROM

ANIMAL WELFARE & ALLERGIES ARE
BECOMING MORE OF AN ISSUE



INCREASINGLY IN THE NEWS AND MEDIA



CONSUMERS STILL WANT THEIR MEAT BUT THEY WANT
IT TO BE HAPPY AND NATURAL MEAT



**PROVENANCE & HUSBANDRY NOW
IMPORTANT**



A Timeline of Tragedy

Mapping decades of live export disasters.
Click on the buttons below to read more.

- Events occurring on land
- Events occurring at sea
- Events occurring in the air
- Significant community-led changes
- RSPCA campaigns

The Animals

- Cattle for Export
- Sheep for Export
- Goats for Export

Timeline periods: 2010-Present, 2000-2009, 1990-1999, 1980-1989



KEY CHANGES: LIFE IS LIVED AT A DIFFERENT PACE

IN A ALWAYS 'ON' WORLD THERE
ARE MORE DEMANDS ON OUR TIME



SO (UNLESS IT CAN FULFIL A LEISURE ACTIVITY) TIME TO
COOK IS SQUEEZED



THEY DON'T JUST WANT MEAT & OTHER INGREDIENTS



THEY WANT MEAL SOLUTIONS



KEY CHANGES: SHOPPING IS SHIFTING FROM STOCKING UP TO 'WHAT DO I FANCY?'

INCREASINGLY MORE SHOPPING
DAY TO DAY
(JUST FOR TONIGHT'S DINNER)



RATHER THAN FOR THE WEEK



LESS PLANNING IN ADVANCE MORE ON THE SPOT/BROWSING



THEIR INTEREST AND TASTE BUDS NEEDS PIQUING



*Today
is the
Day*

*"You have to have things in front of them that
get their interest and they impulse buy"*



DELIVERING TO THESE CORE THEMES DOES GET RESULTS

CONSUMER THEME:

**FOOD IS NOW
ENTERTAINMENT**



**THEY WANT EXCITEMENT IN
THEIR FOOD**



*WHAT IS BEING DONE TO CREATE
MORE OF AN EXPERIENCE?*

**THEY CARE WHERE IT
COMES FROM**



**PROVENANCE & HUSBANDRY NOW
IMPORTANT**



*WHAT IS THEIR PROVENANCE STORY?
IS THIS BEING COMMUNICATED?*

**LIFE IS LIVED AT A
DIFFERENT PACE**



**THEY WANT MEAL
SOLUTIONS**



*WHAT SOLUTIONS ARE
THEY PROVIDING?*

**SHOPPING IS SHIFTING FROM
STOCKING UP TO 'WHAT DO I FANCY?'**



**THEIR INTEREST AND TASTE BUDS
NEEDS PIQUING**



*WHAT IS BEING DONE TO
EXCITE THEM TO IMPULSE BUY?*

Visual merchandising

Branding

Customer service

Value adds

Prepared food & ready meals

Shop fit out

Events

Uniforms

POS materials

Stocks, sauces & ingredients

Recipe ideas

"I look at some shops and I see their dirty aprons and I think just get new aprons. Clean aprons. Simple and cheap. But some guys just don't want to even try"





© ZOOM MULTIMEDIA/BARCROFT

THE SITUATION - THE COMPETITION



THE SUPERMARKETS ARE GOING NOWHERE...

SUPERMARKETS OBVIOUSLY CITED AS HUGE COMPETITION

PRICE

OPENING HOURS (DELIVERING TO CONSUMER
CONVENIENCE TRENDS)

AGGRESSIVE BEHAVIOUR VIA COMMS

'ABUSE' OF LABELLING

UNDERMINING TRAINING



...AND THEY HAVE VERY DEEP POCKETS



PRICE AND CONVENIENCE

SUPERMARKETS WILL ALWAYS WIN HERE

BUYING POWER DUE TO VOLUMES

HIGHER VOLUMES SOLD (SO LOW MARGIN STILL PROFITABLE)

MAKE GOOD PROFITS ON OTHER GROCERY AND HOUSEHOLD ITEMS (SO LOW OR LOSS LEADER MEAT NOT A PROBLEM)

BASIC SKILLS NEEDED FOR MOST ROLES - CAN EMPLOY LOW LABOUR COST STAFF

INDEPENDENT BUTCHERS CANNOT AND SHOULD NOT TRY AND COMPETE HERE

CANNOT AFFORD THE STAFF FOR LONGER OPENING HOURS

CANNOT SELL MEAT AT COMPETITIVE PRICES BECAUSE THEY CAN'T SHIFT A HIGH ENOUGH VOLUME

INTERESTINGLY BULKIES CAN (AND INTEND TO CONTINUE) COMPETING ON PRICE

BUT EVEN HERE THERE IS A REALISATION THAT THEY NEED TO OFFER OTHER ELEMENTS TO CREATE A POD



AGGRESSIVE COMMS

THE SUPERMARKETS HAVE A TREMENDOUS MARKETING BUDGET AND MEDIA BUYING POWER

THEY CAN SHOUT LOUD AND LONG

COMPLAINTS ABOUT MEAT SPECIALS BEING ANNOUNCED BEFORE THE W/ENDS *“Deliberately to damage our trade”*

LITTLE REALISATION THAT SUPERMARKET COMMS AREN'T ONLY A DANGER ON PRICING BUT CAN ALSO RE-POSITION BUTCHERS IF BUTCHERS DON'T FLAG THEIR OWN PRODUCT STORY

I.E. IF A SUPERMARKET LAUNCHES A NON HGP CAMPAIGN THEY ARE TAKING A FIRST MOVER CENTRE GROUND STANCE ON THIS POSITION...CONSUMERS UNLESS THEY RECEIVE NON HGP REASSURANCE AT AN INDEPENDENT BUTCHER COULD POTENTIALLY ASSUME THE MEAT WASN'T HGP FREE AND THAT THE SUPERMARKET WAS THE FIRST TO OFFER THIS

MSA: FROM A BUTCHER PERSPECTIVE NO RECOGNITION THAT SUPERMARKETS USING MSA WAS IN ANY WAY DOING A GREAT JOB ADVERTISING/DRIVING AWARENESS OF IT TO THEIR BENEFIT — THEY WON'T BUY INTO THAT ARGUMENT



Download a FREE Coles & Curtis video recipe right here.



IT'S NOT JUST THE BIG 2

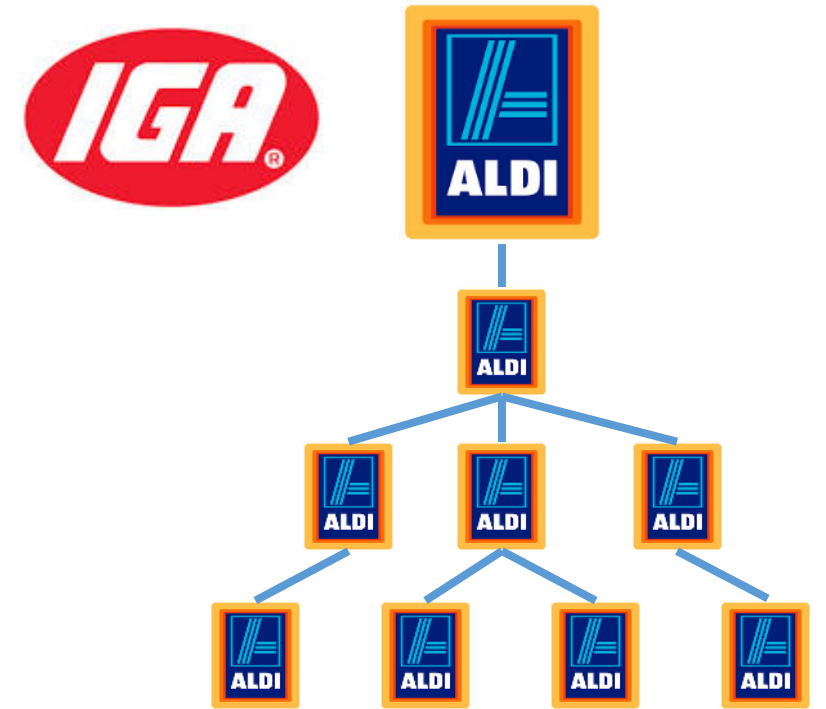
THE EMERGENCE OF COMPETITION TO THE BIG TWO IN THE FORM OF IGA AND IMPORTANTLY ALDI CREATES FURTHER PRICE WARS AND PRESSURE ON INDEPENDENT BUTCHERS

COLES AND WOOLIES WILL DEFEND THEMSELVES ON PRICE AND COLLATERAL DAMAGE IN THIS WAR WILL BE THE BUTCHER

"Well I have three minces, and the cheapest is 4.99, always has been. Anyway, Coles decided they'd come in at 4.99 but they could advertise the hell out of it. Even though mine had always been that. Then Aldi came in at 4.89 to beat Coles! I think it took me a year to claw back my sales to what they were"

FURTHERMORE, FOR SOME CONCERN THAT IGA IS TAKING A LOCAL COMMUNITY POSITIONING, A TRADITIONAL BUTCHERS ROLE BUT BLENDING THIS WITH SUPERMARKET TACTICS

WHILST ALDI SEEM TO BE OPENING AS MANY STORES AS THEY CAN 'SATURATING' AREAS



"3 ALDI's have opened up around here all within a 5-10 minute drive. Three!"



IS THE LABELLING OF BEEF IN SUPERMARKETS FAIR?

SHOULD THERE BE A BROADER NOMENCLATURE FOR BEEF?

MOST BUTCHERS BELIEVE THEY HAVE A BETTER PRODUCT THAN THE SUPERMARKETS AND THEY WANT SOME KIND OF DISTINCTION

HENCE THE INITIAL APPLAUSE FOR MSA - BUT, NOW SUPERMARKETS HAVE MSA, SOME FEEL THE PRESENT SYSTEM DOESN'T DISTINGUISH THE BETTER QUALITY MEAT WELL ENOUGH

THEIR POINT: LABELLING OF "BEEF" USED BY THE SUPERMARKETS ALTHOUGH TECHNICALLY TRUE WAS POTENTIALLY MISLEADING TO THE CONSUMER AND UNDERMINING THE INDUSTRY

SHOULD A LOWER BONING GROUP/OLD COW OF LOWER QUALITY GET THE SAME NOMENCLATURE AS A PRIME YEARLING?

COULD THIS ACTUALLY BE DAMAGING THE PERCEPTION & CONSUMPTION OF BEEF?



A POOR EXPERIENCE WITH THE PROTEIN PUTTING THEM OFF USING IT/REINFORCING CURRENT BARRIERS (BEEF HARD TO COOK/BEEF IS OFTEN TOUGH NO MATTER HOW MUCH I TRY) AND SENDING THEM TO A RIVAL MEAT...



"You have lamb and mutton for sheep there should be a similar thing for beef"



SUPERMARKARKETS - FIGHT OR FLIGHT?

BUTCHER REACTIONS TO SUPERMARKARKETS:

FLIGHT



DO NOTHING

A REAL HEAD IN THE SAND APPROACH LIKE AN ANIMAL PLAYING DEAD HOPING THE PREDATOR WILL GO AWAY



"With that shop I'm just losing money. There's nothing I can do" Butcher

FIGHT



AT THEIR OWN GAME

A BRAVE BUT ULTIMATELY FOOLISH ENTERPRISE FOR A SMALL INDEPENDENT BUTCHER
IMPOSSIBLE TO COMPETE ON PRICE (VOLUME SOLD) AND CONVENIENCE



*"You see them out there. They sell crap meat at cheap prices to try and compete there're just sending themselves under"
Butcher*

CREATE A POINT OF DIFFERENCE

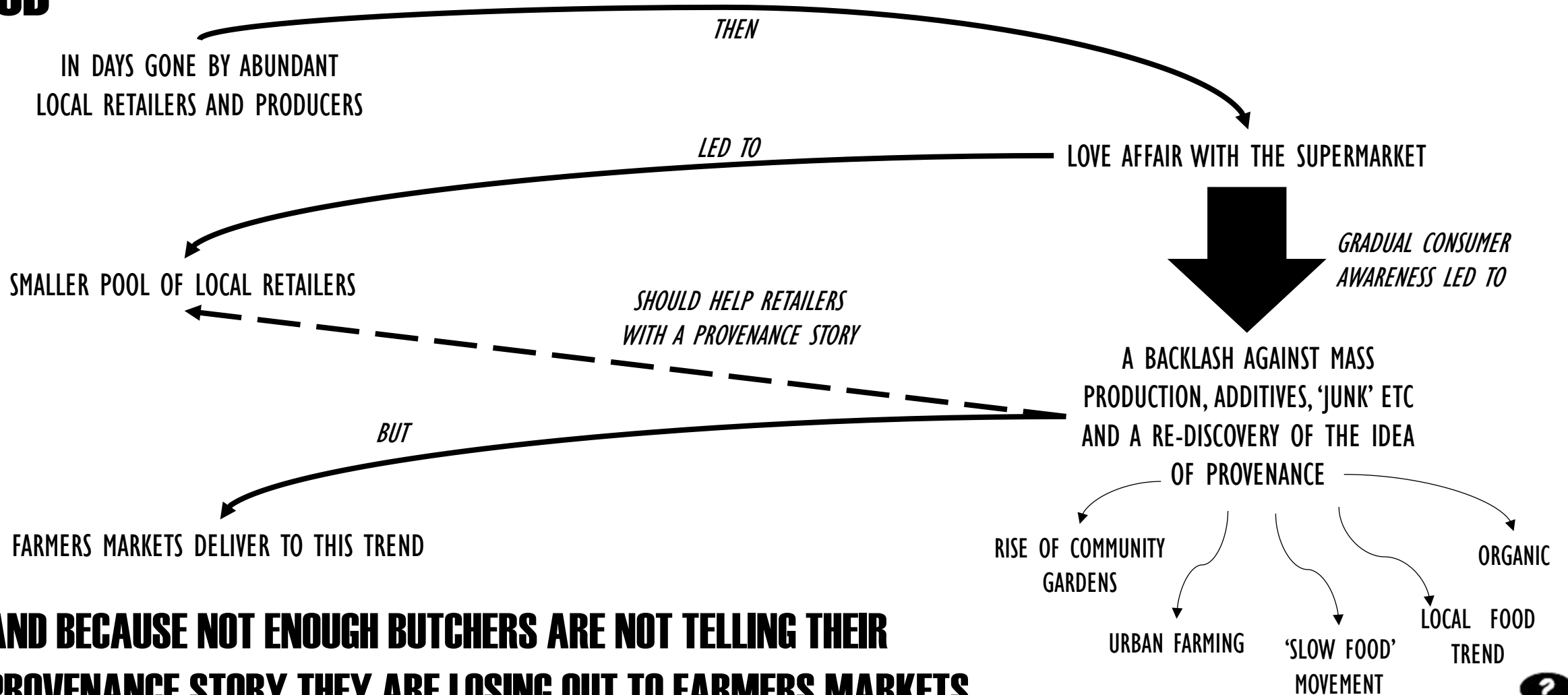
THE ONLY VIABLE ALTERNATIVE AT PRESENT
IDENTIFY THE POINT OF VIEW AND 'STORY' YOU WISH TO TELL
AND TELL IT
CREATE AN ENVIRONMENT THAT IS EXPERIENTIAL
HIT THEIR ACHILLES HEELS (AT PRESENT) BY FOCUSING ON CUSTOMER SERVICE AND QUALITY

"I only offer top quality meat with a service they cannot beat and people are willing to pay for it" Butcher

"We give them a consumer benefit and make them realise that we're different from the mainstream" Butcher



BUTCHERS SHOULD BE ABLE TO CAPITALISE ON CONSUMER TRENDS MOVING AWAY FROM MASS PRODUCTION AND JUNK FOOD



AND BECAUSE NOT ENOUGH BUTCHERS ARE NOT TELLING THEIR PROVENANCE STORY THEY ARE LOSING OUT TO FARMERS MARKETS



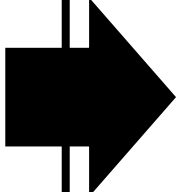
SO ALTHOUGH LESS FREQUENT THE FARMERS MARKET IS ALSO HITTING BUTCHERS

THE SAME QUALITY MEAT SOLD WITH NO MASSIVE OVERHEADS UNDER A HALO OF PROVENANCE

SOME STALL HOLDERS AT FARMERS MARKETS ARE SELLING THE SAME MEAT OUR INDEPENDENT BUTCHERS STOCK SEVEN DAYS A WEEK!

BUT UNDER THE PROVENANCE HALO OF THE FARMERS MARKET CONSUMERS POTENTIALLY BELIEVE THEY ARE BUYING A DIFFERENT OR BETTER PRODUCT OR ONE THAT THEY ARE BUYING DIRECT FROM A FARMER/PRODUCER

AND THESE STALL HOLDERS CAN CREATE A DISTORTION OF PRICING AS THEY HAVE LITTLE TO NO OVERHEADS TO TAKE INTO ACCOUNT — THEY CAN MAKE REGULAR BUTCHERS LOOK A RIP OFF



“I hate the dishonesty of farmers markets. There are people selling meat there under the pretense that it’s direct from the farmer when it’s not I think it’s a real problem”

“The independent retailer seems to have dropped off the radar a little...there is this perception that for a legitimate product you have to go to a farmers market — I respect growers and producers who do want to deal direct with their consumers but these other people who are purporting to do something that they are not...and then getting the support of media who seem to be pushing farmers markets at the expense of independents. And they can sell the meat at a good price because they aren’t paying the rent, the equipment, the insurance, the staff etc so they have a better mark up. I sometimes feel we’d be better off just buying a couple of vans and parking them in farmers markets”



FAST FOOD AND TAKE-AWAYS

ALSO PROVIDE ADDITIONAL COMPETITION AS THEY DELIVER TO BUSY CONSUMER INSTANT MEAL SOLUTIONS

SMARTER BUTCHERS IDENTIFY THIS AS A PROBLEM AND TAKES STEPS TO EXPLORE READY TO COOK AND COOKED MEALS AS AN OFFERING

THIS CAN BE QUITE AD HOC — ONLY A MINORITY APPEAR TO SPECIFICALLY EMPLOYING A FULL TIME CHEF, MOST WILL USE AN EXPERIENCED FAMILY MEMBER, GET PART TIME HELP OR DO IT THEMSELVES

THERE IS NO DOUBT THIS TREND WILL CONTINUE IN FUTURE WITH MORE BUTCHERS EITHER HAVING TO ACCRUE COOKING EXPERTISE OR HIRE IT IN



“Some of them still think they can make a living selling chops and mince well let me tell you it can’t be done. They will go broke.”

“We don’t open on a Sunday. That’s when the cooks come in and use the space to get all our meals ready. We’re not quite ready for a separate commercial kitchen yet but maybe in future”

MORE BUTCHERS WILL BE BRINGING THE KITCHEN AND BUTCHERS BLOCK CLOSER TOGETHER IN AN EFFORT TO DELIVER TO CONVENIENCE TRENDS AND COMBAT TAKE AWAYS





BUTCHERS – A BREED APART



WE HAVE A SITUATION WHERE SOME BUTCHERS HAVE ADAPTED TO THE NEW PARADIGM AND SOME HAVE NOT

THIS LACK OF ADAPTATION IN PART EXPLAINS THE EROSION OF NUMBERS OVER THE YEARS — DOING NOTHING WHEN THE WORLD IS CHANGING AROUND YOU IS A RECIPE FOR DISASTER

THE PRESENT POPULATION OF INDEPENDENT BUTCHERS CAN BE DESCRIBED BY FOUR CORE MIND-SETS THAT DESCRIBE THEIR ATTITUDE TO THE PRESENT BUSINESS CLIMATE AND THEIR WILLINGNESS TO DEAL WITH IT



BLINKERED



FENCE SITTERS



STRIVERS



FOCUSSED



BLINKERED

AKA OLD SCHOOL

DON'T BELIEVE THEY NEED TO CHANGE

SEE OTHER BUTCHERS AS THEIR
COMPETITION

BLAME EVERYTHING AND EVERYONE
ELSE FOR THEIR SITUATION

FIND IT VERY DIFFICULT TO SEE THE
WORLD BEYOND THEIR SHOP (OR EVEN
BEYOND THE COUNTER IN SOME CASES)



*“MY DAD ALWAYS TAUGHT ME
TO PADDLE MY OWN CANOE”*

IN A DIFFICULT SITUATION
EMOTIONALLY

PROBABLY FEEL ATTACKED AND
THREATENED BY THE SITUATION
BUT UNABLE TO ACT OR REACT

POTENTIALLY HELD BACK BY
PRIDE/FEAR

EVEN IF THEY REALISE THEY ARE
GOING UNDER DON'T WANT TO
ADMIT IT OR ASK FOR HELP



**UNFORTUNATELY IT IS PROBABLY TOO LATE TO SAVE MANY
WHO DOGGEDLY CONTINUE ON WITH THIS ATTITUDE**



FENCE SITTERS

PRESENTLY IN STASIS

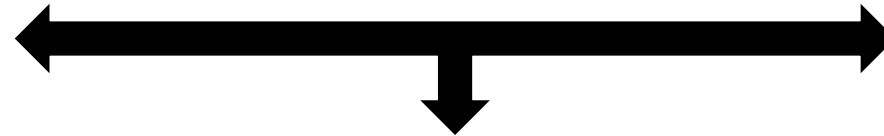
CAN SEE THEY AND THE INDUSTRY IS
IN TROUBLE

BUT TRAPPED IN EITHER A BLAME-
GAME OR RESIGNATION THAT THEY
ARE IN A LOSING BATTLE



GETTING THE STUFFING KNOCKED OUT
OF THEM WEEK AFTER WEEK WILL
HAVE ERODED MORALE AND OPTIMISM

BUT THERE IS HOPE IF WE CAN
RESTORE BOTH OF THESE AND BRING
THEM ON BOARD



**THEY NEED TO REALISE IT'S NOT TOO
LATE/POINTLESS AND THAT THEY
CAN SURVIVE AND, IN TIME, THRIVE**

KEEP
CALM
AND
KEEP
TRYING



STRIVERS

HAVE SEEN THE NUMBERS CHANGE

HAVE SEEN THE WRITING ON THE WALL

KNOW THAT THEY HAVE TO CHANGE
AND HAVING A BLOODY GOOD GO AT IT

GETTING SOME THINGS RIGHT

GETTING SOME THINGS WRONG

COULD STILL IMPROVE ACROSS A VARIETY OF AREAS



**NEEDS TO BE
ENCOURAGED TO LEARN
FROM AUSTRALIA'S BEST**

AN OPEN MINDSET

INCLUSIVE AND WILLING TO NETWORK/LEARN

WANT TO TRY NEW THINGS BUT STILL CAUTIOUS AND NERVOUS

NEED HELP TO STEP UP/PUSH FROM ENTRY LEVEL EFFORTS

NEED HELP ASSESSING WHERE TRUE STRENGTHS AND WEAKNESSES LIE

BUT ALSO NEED RECOGNITION OF EFFORTS AND WORK PUT IN TO DATE



FOCUSSED

FULLY COMMITTED AND FOCUSSED
BUSINESS PROFESSIONALS

COULD PROBABLY RUN A SUCCESSFUL
BUSINESS IN ANY FIELD

AND ALSO MORE LIKELY TO BE
PROFESSIONALS FROM OTHER FIELDS WHO
HAVE ENTERED THE RETAIL BUTCHER
BUSINESS LATER IN LIFE (I.E. MIGHT NOT
BE A 'TRAINED' BUTCHER THEMSELVES)

STRONG UNDERSTANDING OF THEORETICAL
BASIS OF BUSINESS AND CORE ISSUES
(FINANCES, BRAND, CUSTOMER SERVICE,
VISUAL MERCHANDISING ETC)



**NEEDS TO BE HELPED
LEARN FROM WORLD'S
BEST AND BECOME
AUSTRALIAN
FIGUREHEADS**

OBSESSED WITH THE FINAL 10%
LOOKING FOR THE NEXT BIG THING
PROBABLY PUSHING THE ENVELOPE
(MIGHT BE SLIGHTLY AHEAD OF THE
CONSUMER AND STRUGGLING)

LOOKING TO GLOBAL BEST PRACTICE
LOOKING TO INDUSTRY TO HELP IN
AREAS THEY KNOW ARE ISSUES AND
HOLD BACK THEIR BUSINESS (I.E.
STAFFING ISSUES, TRAINING, KUDOS,
ADVERTISING)



FOUR CORE MIND SETS WE NEED TO HELP

BLINKERED



FENCE SITTERS



!



STRIVERS



FOCUSSED



**TOO STUBBORN TO
HELP?
TOO LATE TO SAVE?**

**WE CAN HOPEFULLY
FIRE SOME UP AND
BRING 'ON BOARD'**

**NEED HELP HITTING
AUSTRALIAN BEST
PRACTICE**

**NEED HELP HITTING
GLOBAL BEST PRACTICE**

THE FUTURE WILL BE ABOUT GETTING BUTCHERS TO SHIFT FROM THEIR MINDSET FROM JUST BEING MASTERS OF THE CRAFT TO MORE ROUNDED PROFESSIONALS WITH AN ARMOURY OF BUSINESS SKILLS/APPROACHES THAT WILL PROTECT THEM MOVING FORWARD



THESE MINDSETS ALSO POINT TO A BROADER SPLIT IN THE RETAIL BUTCHER COMMUNITY

BLINKERED



FENCE SITTERS



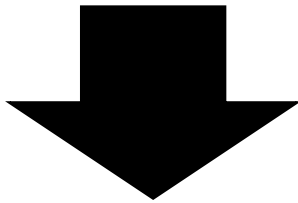
STRIVERS



FOCUSSED

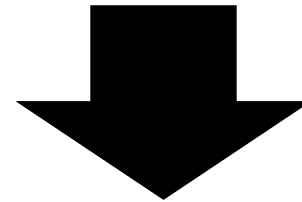


AN OLD FASHIONED MINDSET



TRADESMAN

A NEWER PROFESSIONAL MINDSET



PROFESSIONAL BUTCHERS



A SHIFT IN MORALE

TRADESMAN

BLINKERED



FENCE SITTERS



PROFESSIONAL BUTCHERS

STRIVERS



FOCUSSED



THE HIGHEST MORALE WASN'T NECESSARILY AMONGST THE TREND SETTERS. THOSE RUNNING GOOD QUALITY HIGH END SHOPS SEEMED EXTREMELY OPTIMISTIC

LOW MORALE

STRONG SUSPICIONS AMONGST SOME BUTCHERS THAT DODGY PRACTICES MIGHT BE SLIPPING IN TO TRY AND CUT CORNERS & LOW MORALE COULD BE A FACTOR DRIVING THIS POOR BEHAVIOUR

STRIVERS — DOING IT TOUGH BUT CAN SEE INCREMENTAL GROWTH. A POSITIVE OUTLOOK BUT THEY ARE REALISTIC AND KNOW IT'S ONE STEP AT A TIME

A SENSE SOME OF THE MORE INVENTIVE FIND BEING ON THE LEADING EDGE CAN BE FICKLE

THE HIGH END 'SUPER' GOURMET POTENTIALLY HAS A SMALL MARKET AT PRESENT & CONSUMERS CAN TAKE TIME TO ADJUST TO RADICAL/NEW IDEAS



POOR ACCEPTANCE AND UPTAKE OF DIGITAL TECHNOLOGY

TRADESMAN

BLINKERED



FENCE SITTERS



PROFESSIONAL BUTCHERS

STRIVERS



FOCUSSED



NO EFTPOS

POTENTIALLY DON'T EVEN HAVE
AN EMAIL ADDRESS LET ALONE
OWN DOMAIN NAME

JUGGLING ENTRY TO
THE DIGITAL WORLD

HAVE ONLINE
PRESENCE

AN EFFORT TO
UPDATE AND
ACTIVATE ONLINE
PRESENCE

REALISE THAT ONLINE WILL BE
AN IMPORTANT ELEMENT OF
BRAND

WILLING TO INVEST

WILL USE SOCIAL MEDIA &
APPS

EXPLORING ONLINE ORDERING
CONCEPTS

COG HEAD

SILICON HEAD



THERE IS POTENTIAL FOR TENSION AND DIVISION BETWEEN NEW AND OLD APPROACHES TO THE BUSINESS

TRADESMAN

BLINKERED



FENCE SITTERS



CLOSED

WON'T ADMIT THEY NEED
HELP/CHANGE EVEN IF THEY
CAN SEE IT

JEALOUS AND BITTER OF OTHERS SUCCESS (TALL POPPY SYNDROME)

“THEY AREN'T PROPER BUTCHERS — W**KERS”

PROFESSIONAL BUTCHERS

STRIVERS



FOCUSSED



OPEN AND INCLUSIVE
WILLING TO HELP

BUT

THIS GOODWILL IS ERODING

THE BAD OPERATORS ARE DRAGGING US ALL DOWN

“THEY SHOULD F*&K OFF AND LEAVE THE INDUSTRY SO WE CAN GET ON WITH IT”



AND WHERE WOULD YOU RATHER SHOP?

TRADESMAN

BLINKERED



FENCE SITTERS



PROFESSIONAL BUTCHERS

STRIVERS



FOCUSSED



POOR DISPLAYS — NO EXCITEMENT

POOR RANGE BEYOND TRADITIONAL CUTS — NOTHING NEW OR TO PIQUE INTEREST

LACK OF VALUE ADDS AND MEAL SOLUTIONS — NOT SOLVING CONSUMER PROBLEMS

POOR CUSTOMER SERVICE - INTIMIDATES

UN-RENOVATED SHOPS, OLD TATTY LABELLING, DIRTY APRONS AND SHOPS

'SHOW CASING' OF MEAT & PREP — CREATES EXCITEMENT

MORE BALANCED MIX OF TRAD AND NEW — PIQUES INTEREST

PLENTY OF DIFFERENT MEAL SOLUTIONS — ACTIVELY DELIVERING TO CUSTOMER NEEDS

ACTIVE CUSTOMER SERVICE - ENGAGES

ATTENTION TO DETAIL IN SHOPS, CLEANLINESS, LABELLING ETC

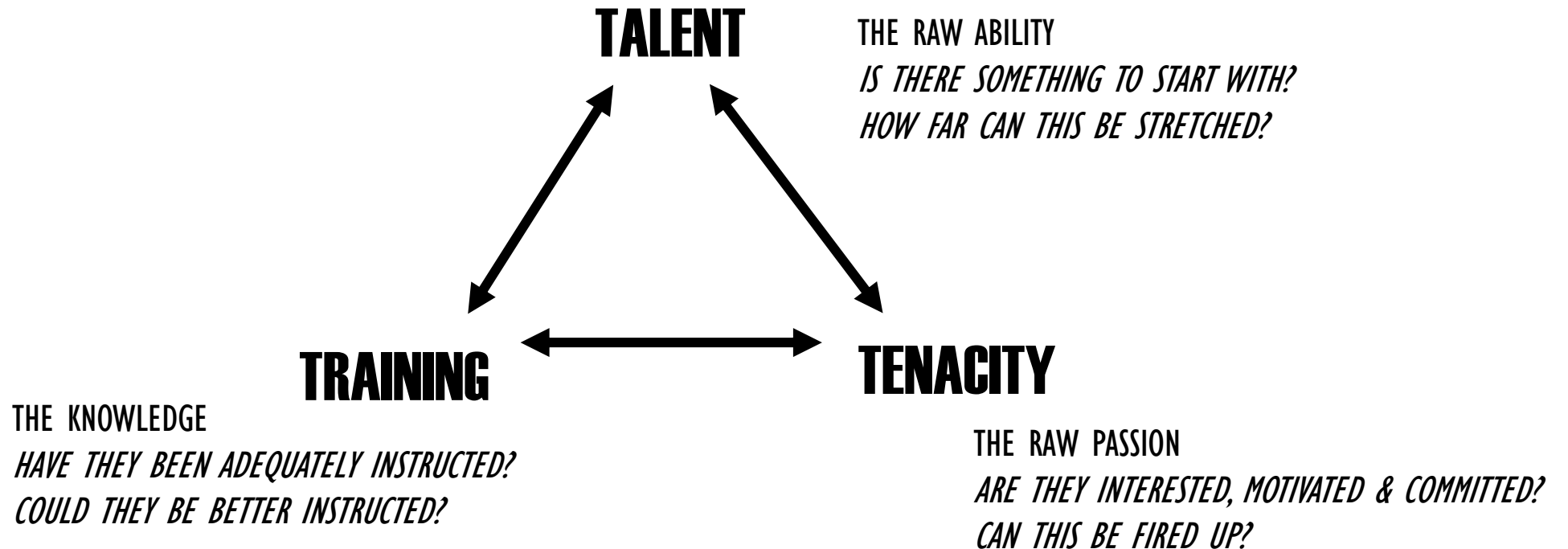


THIS CREATES A DRASTICALLY DIVERSE CONSUMER EXPERIENCE THAT WILL DAMAGE THE PERCEPTION OF BUTCHER AS A 'BRAND'



ARE TODAY'S BUTCHERS UP TO THE MARK?

A SIMPLE FRAMEWORK TO JUDGE WORK PERFORMANCE THAT CAN BE USED AS WELL TO JUDGE A FIRST YEAR APPRENTICE AS IT CAN A 50 YEAR VETERAN:

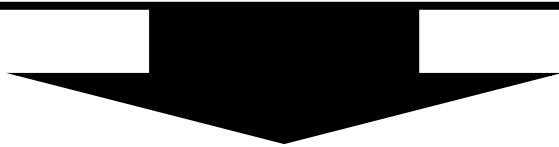
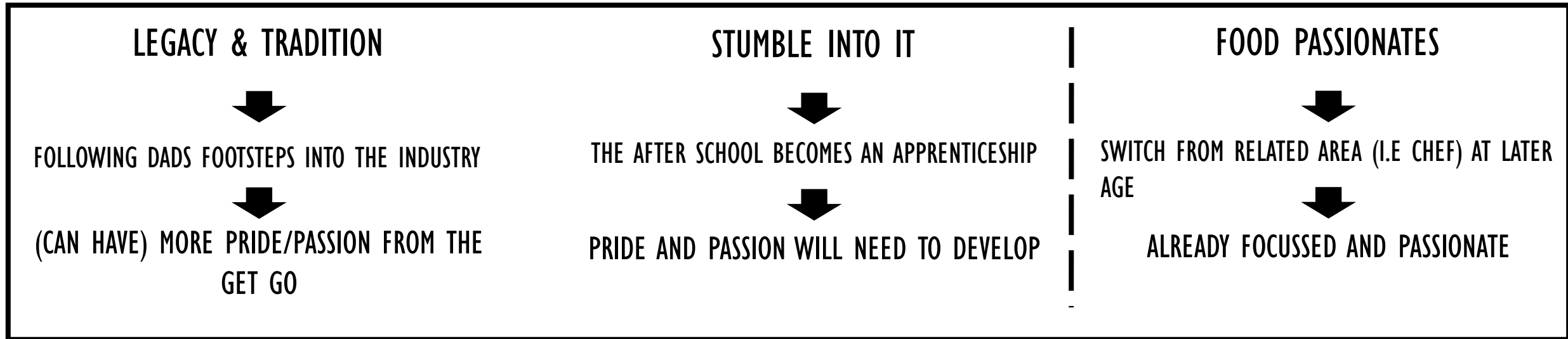


ONE OR TWO WILL ONLY GET YOU SO FAR...UNDERSTANDING IT'S A COMBINATION OF ALL THREE IS WHAT COUNTS

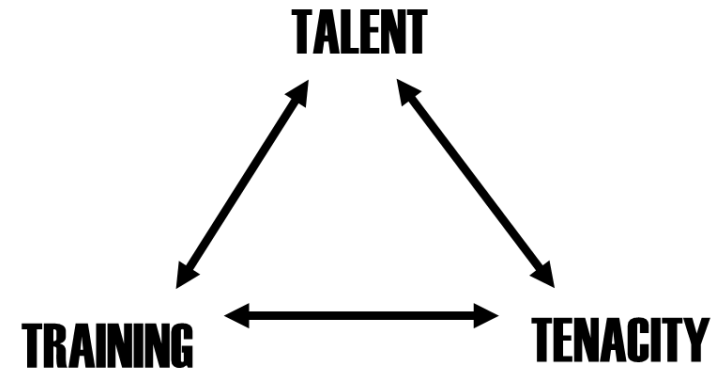


BUTCHER PROVENANCE : HOW THEY ENTER THE TRADE COULD BE IMPORTANT

A BAND OF (MOSTLY) MEN WHO COME INTO THE PROFESSION BY TWO MAIN ROUTES:



HENCE BUTCHERS CAN DISPLAY SIGNIFICANTLY VARYING DEGREES OF PASSION FOR THE INDUSTRY & THIS WILL TELL WHEN TIMES GET TOUGH



BUTCHER PROVENANCE : ENTERING THE TRADE

MOREOVER MANY BUTCHERS ENTER VERY YOUNG IN MOST CASES - FEW FINISH YEAR 12

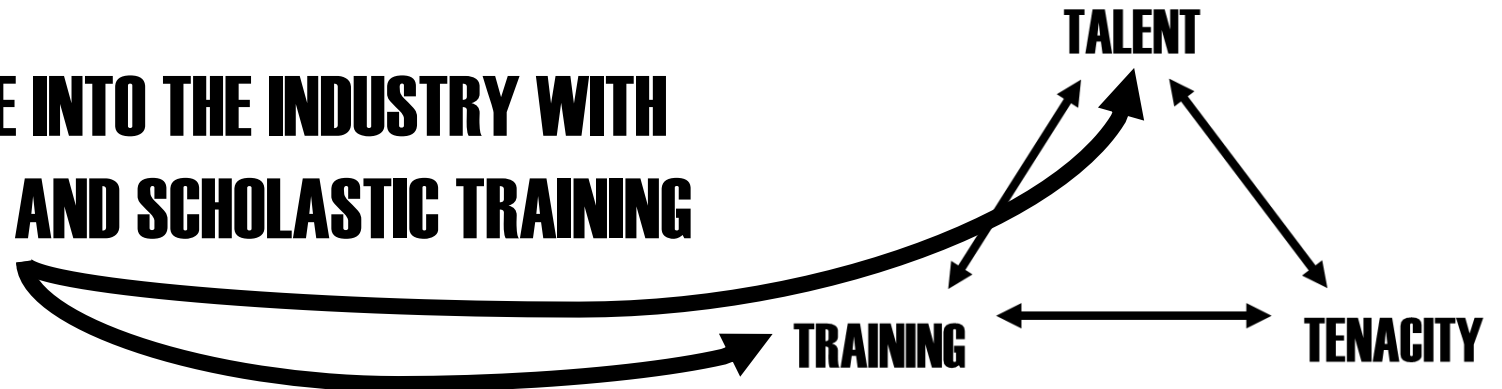
LESS CHANCE TO GARNER
BROADER SKILLS (AND IN
SOME CASES BASIC
SKILLS)

LESS CHANCE TO GARNER
BROADER LIFE EXPERIENCE
& KNOWLEDGE

THAT'S NOT TO SAY BUTCHERS ARE DUMB OR IGNORANT BUT SIMPLY TO
POINT OUT IT POTENTIALLY PUTS THEM ON THE BACK FOOT

*"It's not really their fault but
most would admit the average
butcher didn't really get on that
well at school"*

**IN THE PAST BUTCHERS CAME INTO THE INDUSTRY WITH
DIFFERING LEVELS OF TALENT AND SCHOLASTIC TRAINING**



OLD SCHOOL BUTCHERS

BACK IN THE DAY THINGS WERE EASIER

(A VAST SIMPLIFICATION BUT...)

YOU LEARNT YOUR CRAFT

YOU PUT IN THE TIME GAINING
EXPERIENCE

TOOK OVER A SHOP

THEN

YOU PLIED YOUR TRADE

SUPERMARKETS AND SHOPPING CENTRES WERE LESS PREVALENT
(MORE OF A CAPTIVE AUDIENCE)

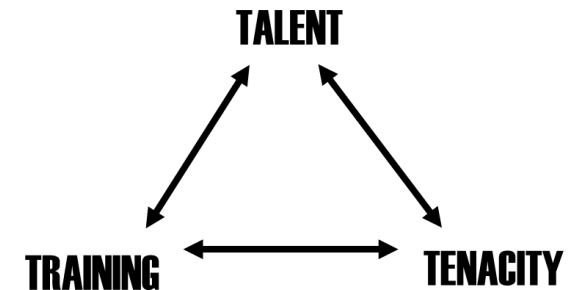
EXTENDED OPENING HOURS WEREN'T IN OPERATION

CONSUMER SHOPPING AND EATING HABITS WERE MORE PREDICTABLE

DIVERSITY OF FOOD CULTURE LESS DEVELOPED

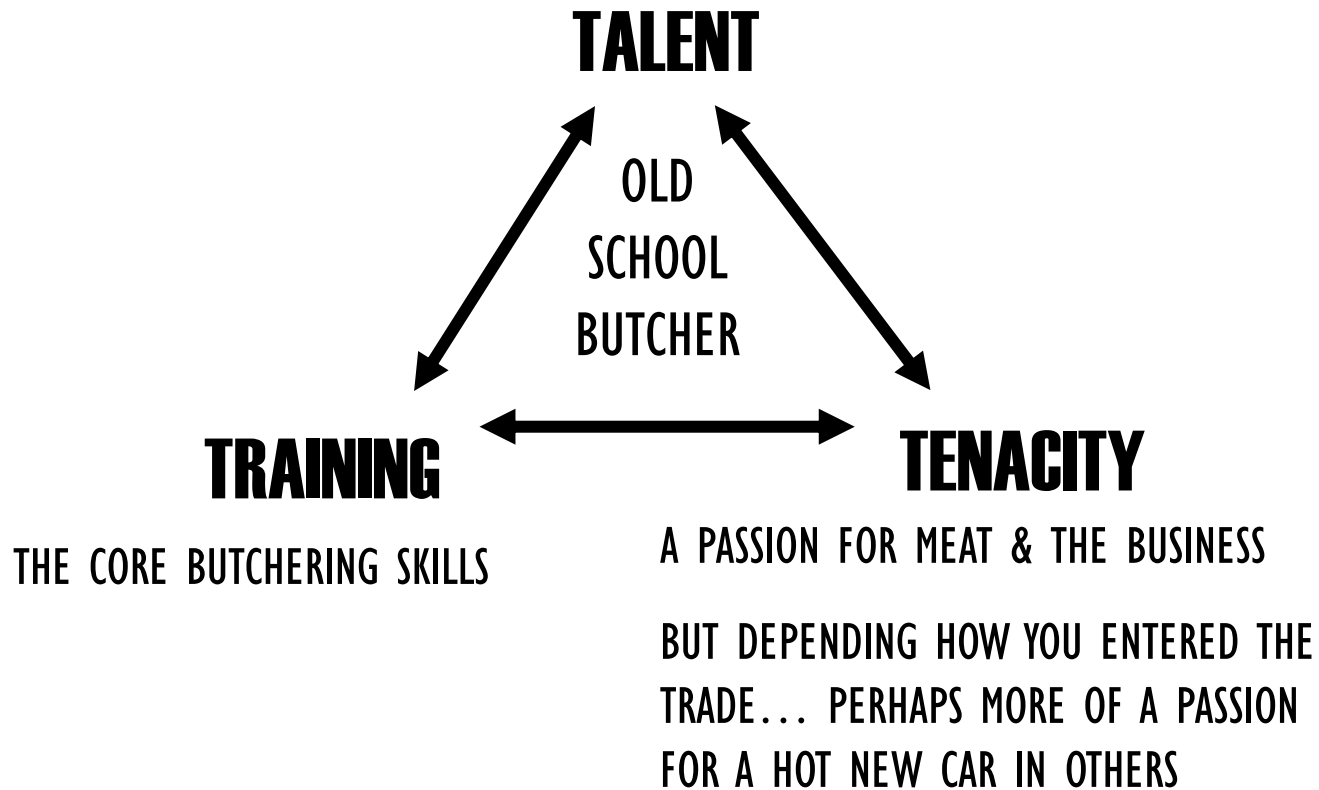
FAST FOOD WAS LESS PREVALENT

**A BUTCHER COULD MAKE A VERY GOOD LIVING ON HIS BUTCHERING
TRADE SKILLS – HE HAD ALL THE TRAINING HE NEEDED**

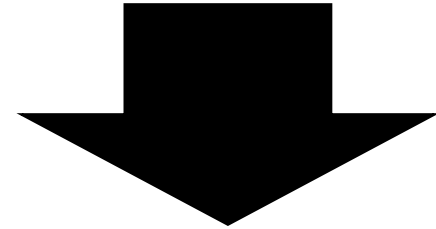


THE OLD SCHOOL BUTCHER AND THE THREE "T's"

TALENT MORE LINKED TO THE PHYSICAL NATURE OF THE JOB, THE STRENGTH AND PRECISION TO BREAKDOWN AND PREPARE MEAT



SO IN THE PAST THE THREE T'S WERE VERY MUCH FOCUSED ON THE CORE OF THE TRADE, HANDLING, BREAKING DOWN AND SELLING MEAT



ROSE TINTED DEATH

THINKING THAT THE WAY BUTCHERS LEARNED AND PLIED THEIR TRADE IN THE PAST WILL STILL WORK TODAY IS A FOLLY

BACK IN THE DAY THINGS WERE DIFFERENT
(A VAST SIMPLIFICATION BUT...)

- YOU LEARNT YOUR CRAFT
- YOU PUT IN THE TIME GAINING EXPERIENCE
- TOOK OVER A SHOP

THEN

- MARKETS AND SHOPPING CENTRES WERE LESS PREVALENT (MORE OF A CAPTIVE AUDIENCE)
- EXTENDED OPENING HOURS WEREN'T IN OPERATION
- SHOPPING AND EATING HABITS WERE MORE FORMAL
- DIVERSE FOOD CULTURE LESS DEVELOPED
- FAST FOOD WAS LESS PREVALENT

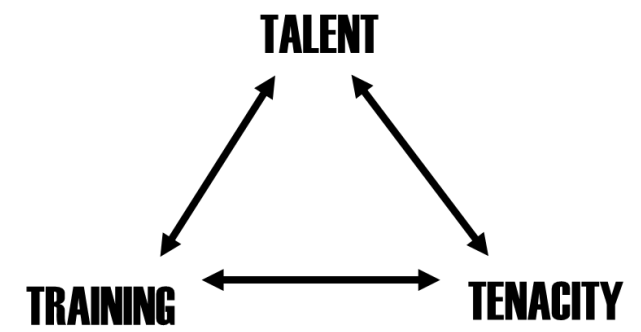
NOW

To name but a few...

- SHOPPING HABITS HAVE CHANGED
- LIFESTYLES HAVE CHANGED
- CONSUMER DIFFICULT TO PREDICT
- COMPETITION HAS INCREASED
- COMPETITION HAS BECOME MORE AGGRESSIVE
- ATTITUDE TO FOOD HAS CHANGED
- ATTITUDE TO ANIMAL WELFARE HAS CHANGED
- LEGISLATION TIGHTER
- STAFF MORE DIFFICULT TO FIND/RETAIN
- ETC, ETC, ETC

SO IN THE PAST A BUTCHER COULD GET BY WITH LIMITED SKILL AND TRAINING IN OTHER AREAS SUCH AS:

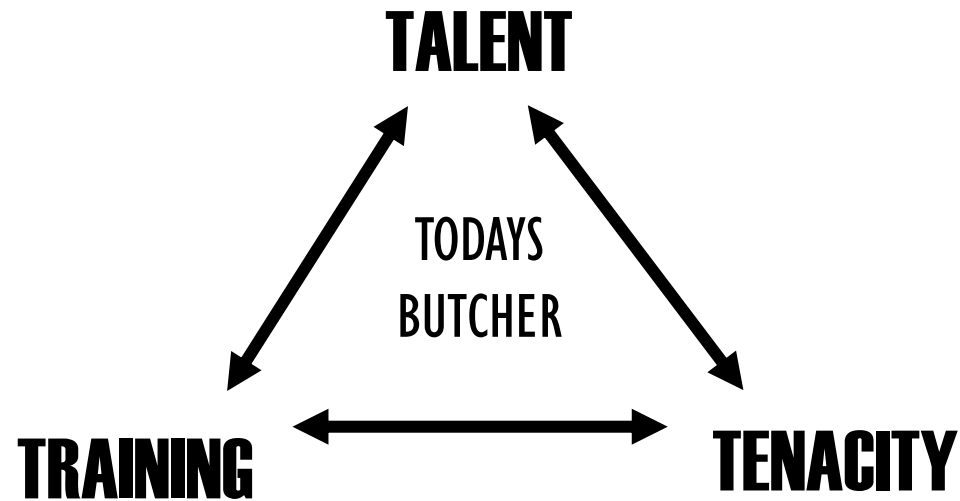
- | | |
|--|------------------------|
| <i>Consumer insight</i> | <i>Business skills</i> |
| <i>Customer service (and retention!)</i> | <i>Online skills</i> |
| <i>Brand</i> | <i>Social media</i> |
| <i>Visual merchandising</i> | <i>Food knowledge</i> |
| <i>Value add and cooking skills</i> | |



TODAYS BUTCHER AND THE THREE "T's"

IT'S NOT JUST ABOUT THE MEAT ANYMORE

IS THERE A NATURAL (PERHAPS LATENT?) TALENT FOR OTHER AREAS WHICH ARE NOW KEY? I.E. FINANCES, PEOPLE SKILLS, COOKING SKILLS



SHOULD NEVER, EVER, STOP

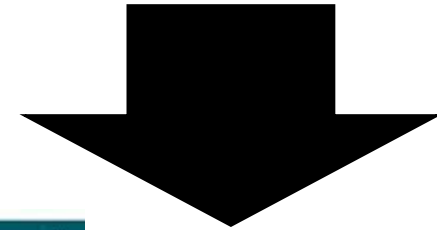
HAVE THEY BEEN TRAINED (SELF OR OTHERWISE) TO NEW AREAS OF EXPERTISE AND SKILLS?

ARE THEY OPEN TO TRAINING AND LEARNING NEW SKILLS?

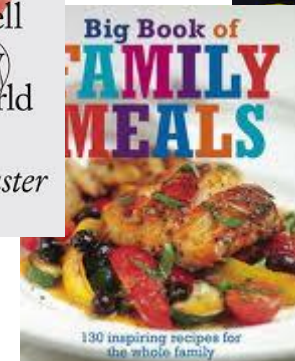
IS THE PASSION STILL THERE?

AND IF SO DOES THIS PASSION EXTEND BEYOND TRADITIONAL BUTCHERING INTO OTHER AREAS TOO? BROADER FOOD & CUISINE, RETAILING, CUSTOMER SERVICE ETC

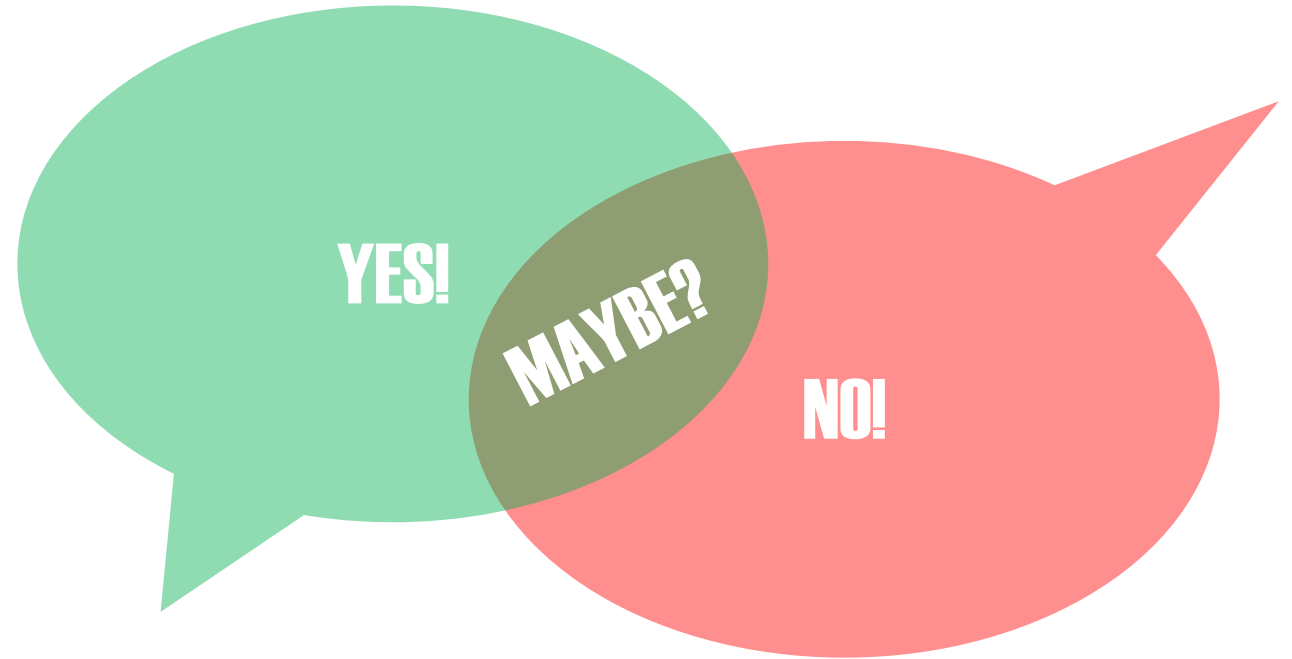
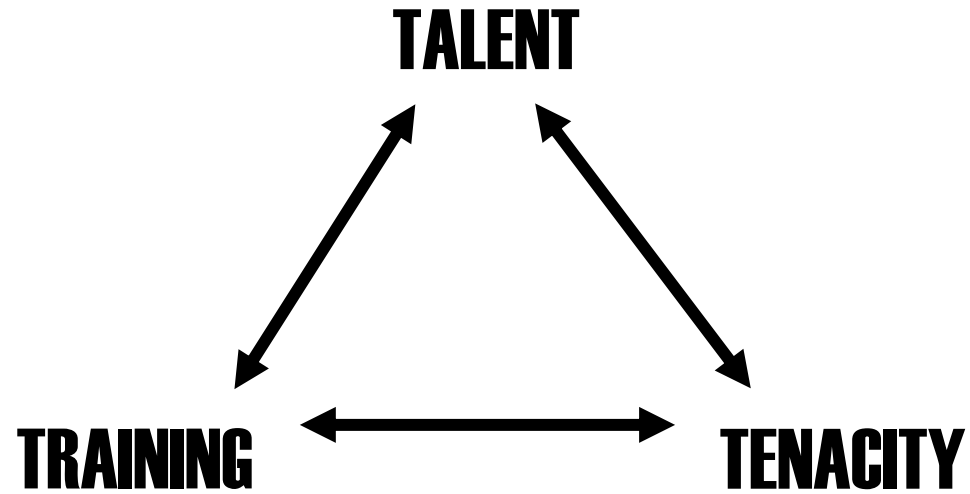
A BUTCHER TODAY NEEDS A BETTER GRASP OF MANY SKILLS OUTSIDE THE TRADITIONAL TERRITORY ASSOCIATED WITH THE PROFESSION



DO/
STORY/
How to tell your story so the world listens.
Bobette Buster



SO WE MUST ASK ARE TODAY'S BUTCHERS UP TO THE MARK?



THIS STUDY HAS DEMONSTRATED THAT CLEARLY THERE ARE A GOOD MANY WHO HAVE PUSHED THINGS ON BEYOND THE OLD SCHOOL APPROACH

BUT...THERE ARE ALSO MANY, PERHAPS AT PRESENT THE MAJORITY WHO HAVE NOT ACCEPTED, ADAPTED, OR ADJUSTED THEIR APPROACH AND IT IS HERE WHERE THE FUTURE LOSSES TO THE INDUSTRY WILL OCCUR



THE CONSENSUS IS THAT MOST BUTCHERS ARE WAY BEHIND THE EIGHT BALL

“Of all the retail operators I know, butchers would be by far the worst at managing their businesses”

“I would say the average butcher is maybe 5-6 years behind other retailers — they just aren’t staying in touch”

“There are so many facets to really making retail work that to take it on without some business acumen means you are doomed” Expert retailing consultant



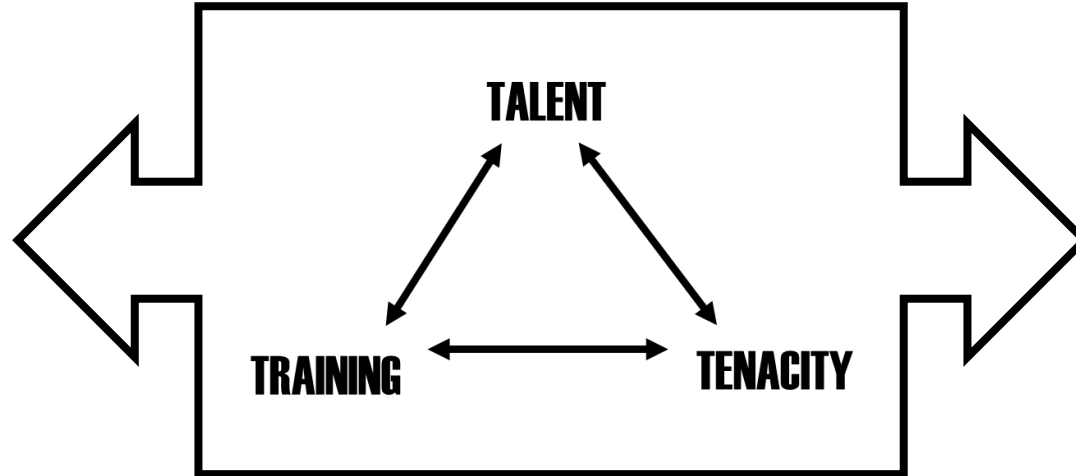
TO HELP BUTCHERS SURVIVE IT IS FUNDAMENTALLY CLEAR WE MUST DRIVE THE UPTAKE OF BROADER BUSINESS SKILLS AND WHERE IT'S LACKING RE-IGNITE THEIR PASSION

BUSINESS ACUMEN

NATURAL OR LEARNED THROUGH
BLOODY HARD GRAFT

"In some respects they need to be better businessmen now than butchers!" Supplier

"In years gone by you could make a lot of money as a butcher without being a good businessman but in todays market those days have gone" Supplier



PASSION

AN UNQUENCHABLE DESIRE TO
KICK GOALS & BE THE BEST

"I tell you I love retail. I really love it." Butcher

"I love it. I want it to be like it is in Europe. Respected, looked up to as an artisan" Butcher

"It's about the best. The best product prepared properly with care and attention. It's about that last 10% that's where the difference is" Butcher



INDUSTRY BODIES



THE MLA

A *FAIRLY* GOOD PERCEPTION OVERALL

YES THERE ARE PROBLEMS THAT BUTCHERS COULD FIND BUT MOST WERE FAIR AND BALANCED IN THEIR APPRAISAL OF THE MLA'S ROLE

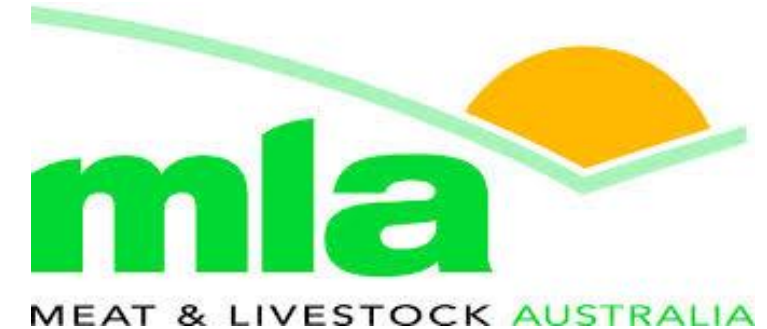
A BIG WELL DONE:

RMNC  AUSTRALIAN BUTCHERS GUILD

A COUPLE OF ISSUES:

MSA — THIS IS A MAJOR BONE OF CONTENTION FOR SOME WHERE MLAs TRUE LOYALTY LIES — WILL EFFECT WILLINGNESS TO TRUST/ENGAGE IN FUTURE

"I think there is a disconnect between the hierarchy of the cattle groups and their members. The MLA is heavily influenced by the cattle council who have a big say in what they do but I don't think that is reflective of what their members want. I think if you talk to farmers they would want the independent butchers to survive"



"We sometimes think they don't pay as much attention to the domestic market as they do overseas" Supplier



MLA CAMPAIGNS

RECEIVED A MIXED RESPONSE

MOST THINK A FAIR JOB

BUT SOME HATERS — FEEL DONE BY SOME 'SYDNEY' TYPES



AUSTRALIA DAY CITED AS THE MOST SUCCESSFUL

CREATES SELL OUTS

SOME OF THE OTHER CAMPAIGNS FELT TO BE MORE HIT AND MISS

THE EFFORT TO HELP PEOPLE USE SECONDARY CUTS IS FELT TO HAVE BEEN VERY SUCCESSFUL

BUT A FEELING THE BUTCHER HAS BEEN LOST IN THE ADVERTISING

DANCING BUTCHERS FROM RED MEAT NUTRITION CAMPAIGNS MENTIONED A FEW TIMES WHY NOT "SUPPORT YOUR LOCAL BUTCHER IN MESSAGING"?

A FAIR POINT — IF THE FOCUS IS SOLELY ON THE MEAT CONSUMERS CAN POTENTIALLY FORGET OR SEE THE BUTCHERS ROLL AS A SKILLED TRADESMAN/SOURCE OF KNOWLEDGE AS DEFUNCT



"All the magazines and POS stuff is great. They have this great app called steak mate. But I think gary is a bit stretched. It's difficult for him to support so many retail butchers by himself"

"There needs to be a lot more marketing to encourage people to still use their independent butchers. I believe that's one area the MLA has been a bit remiss in"

"In the early 80's we had samson o'brien — he was the face of the independent butcher — short quick skirts and it really got the message across about the role of the independent butcher"



MLA IN STORE SUPPORT/COLLATERAL

ENTICE

GREAT - KEEP IT UP

REQUEST TO MAKE SURE RECIPES A MIX OF ACCESSIBLE TO MORE CHALLENGING



RECIPE CARDS, PAMPHLETS ETC

GOOD - LOVE GIVING THEM AWAY,
HELPS SELL IN IDEAS/CUTS



POSTERS

FEELS LIKE THEIR REACHING THE END OF THEIR USEFULNESS?

SOME THROW OUT AS SOON AS RECEIVED — THE MORE PROGRESSIVE BUTCHERS PREFER OWN LOOK/AESTHETIC

SOME STILL USE BUT MAYBE WE SHOULD BE ENCOURAGING THEM TO CREATE OWN STORIES OR HAVE TEMPLATES TO ALLOW LOCAL CUSTOMISATION?



“MLA sends boxes of shit out to me....we have no involvement in it. Some group does it in Sydney. There's nothing in there that allows us to customise our marketing....interesting templates that allows us to get the core message out but build our brand as well.”



AUSTRALIAN BUTCHERS GUILD



“The rebranding of the red meat networking thing was great”

“It made me feel part of something”



**A TREMENDOUSLY SUCCESSFUL RE-BRANDING
OF THE RMNC**

**A VALUABLE TOOL FOR THOSE WILLING AND
OPEN TO TALK/CONNECT**

**A FILLIP TO THEIR CONFIDENCE - WORKS SOME WAY
TOWARDS RESTORING PRIDE**

AND A CLEAR INDICATOR THAT THE BRAND OF
THE BUTCHER IS IN NEED OF REINVIGORATION



NETWORKING TOURS AND EVENTS

THOSE THAT ATTEND LOVE THEM!

WANT TO DO AND ARE OPEN FOR MORE

THEY SHARE IDEAS (AND THEIR WOES), THEY DEVELOP A CAMARADERIE AND COLLABORATIVE MIND-SET

A STRONG ROLE TO PLAY GOING FORWARD IN HELPING BUTCHERS SEE AND LEARN FROM AUSTRALIAN BEST PRACTICE

BUT THE TOP NOTCH GUYS WANT THIS PUSHED FURTHER

INTERNATIONAL TOURS AND TRIPS — A DESIRE TO SEE AND LEARN FROM BEST GLOBAL PRACTICE



THE ABG REBRAND IS WORKING VERY WELL AND SHOULD BE BUILT UPON TO BUILD/RESTORE MLA CREDIBILITY WITH BUTCHERS WHILST SIMULTANEOUSLY HELPING THEM TO SHARE AND EXCHANGE SUCCESSFUL BUSINESS APPROACHES



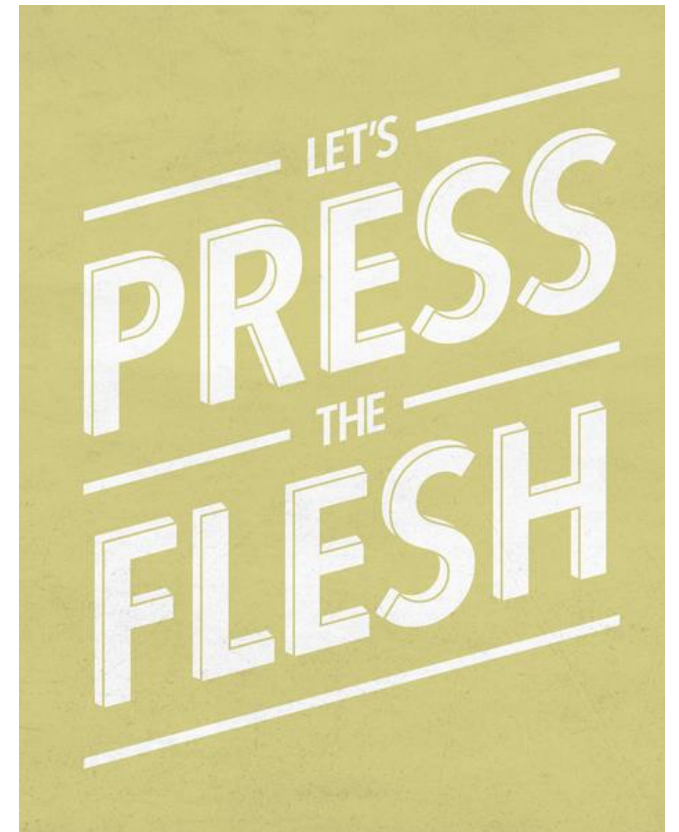
MLA - THEY DO LIKE A VISIT FROM THE REPS

ALMOST ALL THE BUTCHER'S SPOKEN TO MENTIONED THEY DID APPRECIATE A VISIT FROM THE MLA STATE MANAGERS

THOUGH THEY HAVE NOTED SOME (OTHER ORGANISATIONS) HAVE MORE ATTITUDE THAN OTHERS WHICH CAN PUT THEIR NOSES OUT OF JOINT
SOME CAN BE TOUCHY/NERVY ON THEIR ON PATCH

PERHAPS THE POWER OF A FACE TO FACE VISIT SOMEWHAT REFLECTS AN OLDER MINDSET BUT IT FEELS LIKE SOMETHING THAT WORKS AND SHOULDN'T BE LOST

RECOMMENDATION — ALTHOUGH HARD TO DO WITH DWINDLING BUDGETS A FACE TO FACE VISIT SEEMS TO CARRY MUCH WEIGHT FOR SOME





IT IS CLEAR THAT, RIGHT OR WRONG, MANY BUTCHERS HAVE ISSUES WITH THE SYSTEM

ROLE & REASON FOR BEING

AMONGST SOME THERE SEEMS TO BE CONFUSION ABOUT WHAT IT WAS DESIGNED FOR (GUARANTEE OF QUALITY) AND THE ROLE BUTCHERS WANTED TO USE IT FOR (DIFFERENTIATION OF THEIR PRODUCT FROM SUPERMARKETS)

"I'm still happy to have all the MLA stuff in the shop but we just won't use the MSA stuff that's all"

COMPREHENSION/COMPLEXITY

FOR SOME IT'S FELT TO BE OVERLY COMPLEX
DESIGNED BY SCIENTISTS FOR USE BY BUTCHERS — THAT'S YOUR PROBLEM RIGHT THERE
AND WHAT DO CONSUMERS MAKE OF IT?

"We put all our staff through training with the MLA and they still find it confusing!"

CONSISTENCY OF DELIVERY

ALTHOUGH THE VAST MAJORITY BUY USING IT THEY HAVE GRIPEs ABOUT THE CONSISTENCY OF DELIVERY FROM SUPPLIERS
IT IS CLEAR THAT THE STANDARDS ARE NOT ALWAYS BEING FOLLOWED PROPERLY

"Sometimes you open a carton and you think what's this?! It's black!"

CONCERNS THE SYSTEM IS NOW TOO GENEROUS

MORE ANIMALS THAN BEFORE CAN NOW GET MSA GRADE
THEY FEEL THIS IS UNDERMINING THE SYSTEM AND LETTING CHEAPER MEAT STEAL THE BADGES KUDOS

Beat it with a hammer, drag it round the car pack chained to the car. It's not going to be good and you'll have to give it to the dog"



MSA – DO CONSUMERS UNDERSTAND IT? IS ONE STAMP ENOUGH?

ALTHOUGH NOT INCLUDED IN THE STUDY THERE WAS SOME CONCERN FROM THE BUTCHERS ABOUT WHAT THE CONSUMER MADE OF MSA

ON THE WHOLE THE FEELING IS THAT THE CONSUMER DOESN'T UNDERSTAND IT ANY MORE THAN A SINGULAR MARK OF QUALITY

THE BUTCHERS DON'T LIKE THIS BLANKET STAMP APPROACH AS IT UNDERMINES THE QUALITY OF THE MSA GRADED MEAT *THEY* BUY I.E.

A BUTCHER BUYS YEARLING MSA TENDERLOIN FOR \$20/KG

A SUPERMARKET BUYS OLDER, LOWER BONING GRP MSA TENDERLOIN FOR \$9/KG

THE CONSUMER SEE'S MSA ON BOTH PRODUCTS AND AT PRESENT COULD BE CONFUSED INTO THINKING THEY ARE GETTING THE SAME PRODUCT AND THIS THEN RE-POSITIONS THE BUTCHER AS A RIP-OFF

FURTHERMORE, IF THE LOWER BONING GRP TENDERLOIN DOES NOT COOK AS WELL, EASILY OR TENDERLY THE CONSUMER MIGHT BELIEVE BEEF IS JUST HARD TO COOK OR THEIR OWN SKILLS ARE LACKING RATHER THAN THE FACT THEY ARE COOKING A BEEF FROM A POORER SOURCE — THIS COULD FURTHER REINFORCE BARRIERS TO BEEF CONSUMPTION AND COOKING CONFIDENCE

“It’s not right that my great meat gets the same stamp as the stuff in woollies. It just isn’t. But if you gave me the chance to say I had MSA platinum while they could only say silver then I’d use it”

“My problem is what happens if they get some crap MSA from a supermarket. They get home and it’s tough as. But they think they’ve bought the best beef right? So next time they go out they will buy chicken instead”



MSA – UPTAKE BY SUPERMARKETS AND BROADENING OF THE QUALITY OF CATTLE THAT NOW QUALIFY HAS LED TO QUESTIONING OF MLA LOYALTIES

MSA SYSTEM INITIALLY GENERATED MUCH POSITIVITY FROM BUTCHERS TOWARDS MLA

THEY FELT IT WAS A SYSTEM FOR THEM ALONE

A TOOL TO LEVEL THE PLAYING FIELD WITH THE MAJOR SUPERMARKETS (WHO ALREADY HAVE PLENTY OF ADVANTAGES)

SUBSEQUENT UPTAKE OF MSA BY SUPERMARKETS COMBINED WITH CHANGES THAT ALLOW MORE LOWER BONING GROUP ANIMALS IN HAS ERODED THIS TRUST/POSITIVITY AMONGST MANY INDEPENDENT BUTCHERS

IT HAS ALLOWED THE SUPERMARKETS TO SELL CHEAPER MSA BRANDED PRODUCT UNDERCUTTING THE INDEPENDENT BUTCHERS BETTER QUALITY MSA PRODUCT

“MSA was one of the best things to happen to the meat industry when it first started. It was just the top end and butchers got behind it and it was great. But now it’s broadened out and a lot more cattle qualify for it. In the old system if it needed to be aged for more than 21 days it wasn’t good enough...If I was a butcher today and I was trying to get \$20/kg for my rump and I was next door to Woolworths do you think I’d put the same logo on as there’s at \$13?” Supplier

“They shouldn’t have let the supermarkets use it. As soon as they did that I stopped using it”

“Butchers still use MSA as a tool for purchasing but they don’t want to use it for selling” Supplier

“We used to have an edge when we had it and nobody else did but now everyone has it doesn’t give you an edge”



AMIC

MIXED REACTIONS - AND FELT A LITTLE POLARISING

BASICALLY CAME DOWN TO THE QUESTION ARE YOU IN THE CLUB OR NOT?

MANY ADMIT THERE IS A ROLE FOR THE ORGANIZATION

SOMETIMES HELP IS NEEDED WITH IR AND THE LIKE

BUT KNOWLEDGE ABOUT THE FULL FUNCTION AND RANGE OF SERVICES/ASSISTANCE MIXED

SOME ENGAGEMENT WITH THE COMPETITIONS

BUT SOME GRIPING ABOUT PAYING TO ENTER. *'Is it just a money making exercise'*

FOR THOSE WHO DIDN'T FEEL PART OF THE CLUB:

ROLE CAN SEEM POINTLESS

AN OLD BOYS CLUB - FEELINGS OF NEPOTISM ONLY LOOKING AFTER YOU IF YOU'RE IN THE INNER CIRCLE

SOME FEELING THEY ARE BEHIND THE TIMES OR INEFFECTIVE IN THEIR PREVARICATIONS

ARE THEY GETTING STUFF DONE? ARE THEY ADAPTING TO THE CHANGING MARKET? IS IT THE SAME OLD DISCUSSIONS WITHOUT ACTION?

INTERESTINGLY SOME BELIEVE THERE MIGHT BE A THREAD OF OLD FASHIONED MINDSETS IN THE ORGANISATION - THIS IS A CONCERN

"We sometimes wonder what we're paying our membership for. They are all very nice but I'm not sure they are being as useful as they could be. They should be teaching butchers about social media or retailing or upselling"

"In my view AMIC is asleep — it's a member driven organisation so it should be out there doing stuff for it's members. It's main thing is IR but I think that it's accuracy there is sometimes questionable. But they should be pushing the independent butcher. They give you a little sign but we don't put it up. It has no value at all. The competitions are very one sided we won one year when we bought from of lots of different suppliers who were the judges but now we just buy off one supplier to get a better price and we can't win awards..."

"I can feel it, I sit on those councils and I can tell they know it's going wrong but they don't want to admit it"

AMIC APPEARS TO HAVE QUITE A POLARISED MEMBERSHIP – PLENTY OF BUTCHERS ARE QUESTIONING IT'S ROLE AND RELEVANCE MOVING FORWARD



AUSTRALIAN PORK

PERFORMING QUITE WELL

GOOD ADS

SEEN AS HAVING THEIR FINGER ON THE PULSE

BUT HARDLY SEE THEIR REPS

INTERESTING SUPPORT FOR THEM (THOUGH MIXED LEVELS OF BUY-IN) VIA THE BUTCHERS BATTLE PLAN



**APL HAS APPEARED TO UP IT'S GAME OVER THE LAST FEW YEARS
PROVIDING SUPPORT THROUGH CONSUMER AND BUTCHER INITIATIVES**





Welcome to issue 40 of the Butcher's Battle Plan. Our program aims to help butchers with simple ideas to boost your sales, profitability and customer loyalty based on extensive consumer studies and learnings.

Butcher's Battle Plan 2014



**Steak is the most popular
weekday dinner meal.**

This information is important in deciding what information/recipes to send or distribute to your customers.

We know that 64% of consumers plan their evening meal on the day. This is a perfect opportunity to email pork fillet recipes to your database or share on social media on a weekday morning to remind customers to pop into your store.

Make the recipes even more enticing by promoting mid week specials on pork fillets to increase traffic to your shop.

[Click here](#) for all our pork fillet/steak recipes.

APL HAS TAKEN THE INITIATIVE IN SUPPORTING BUTCHERS

**APL OVER THE LAST COUPLE OF YEARS HAS RAMPED UP
ITS ACTIVITY THAT DIRECTLY SUPPORTS BUTCHERS**

**THE BUTCHERS BATTLE PLAN A STEP IN THE RIGHT
DIRECTION**

**WEEKLY EMAILS, SEMINARS, ONLINE RESOURCES,
TEMPLATES AND CHECKLISTS TO HELP IMPROVE
BUTCHERS BROADER SKILL SET**

"I like the butchers battle plan. They give you tips on how to boost your Facebook status and they send out emails every week. They have seminars and stuff"

"Someone in the backroom at APL is looking through their consumer data and sending it out to us as tips"





An Australian Government Initiative

A U S T R A L I A N A P P R E N T I C E S H I P S

Your Life. Your Career. Your Future.



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APPRENTICESHIPS



“IT’S TOUGH TO FIND APPRENTICES...AND IT’S REALLY TOUGH TO FIND A GOOD ONE”

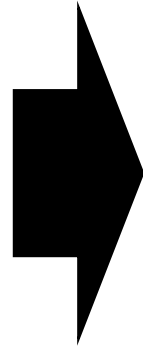
THE FACT THAT IT’S HARD TO FIND APPRENTICES CLEARLY SHOWS THERE IS AN IMAGE PROBLEM WITH THE BRAND OF THE BUTCHER



BUTCHERS HAVE NO TRUE TALENT POOL FROM WHICH TO INTERVIEW OR SELECT A POTENTIAL CANDIDATE - IT IS LUCKY DIP

“You just put them on a see how they do...some last a week, some a month...”

IMAGINE THE MAN-HOURS WASTED BECAUSE OF THIS!



“My own son doesn’t want to be a butcher and it’s coz he doesn’t want to tell his friends that’s what he is...”

“We won Meat retailer of the year and one of our apprentices has won apprentice of the year it’s not like they’re coming to a bad place...and we can’t get them!”

“The biggest problem out here is tradesmen with any business acumen. Staff is a big problem. And we can’t find apprentices. We’ve done ads on Facebook, paid to boost it, it went on 18,000 Facebook pages and it didn’t get one single applicant”

“I rang twelve schools to see if they had apprentices. The schools weren’t even prepared to put it to the students. I got applicants from one school in the end and they were all new Australians”



WHERE WOULD YOU LIKE TO DO YOUR APPRENTICESHIP?

IT IS CLEAR THAT THERE IS THE POTENTIAL TO GET A VERY DIFFERENT EXPERIENCE DEPENDING UPON WHO YOU TRAIN WITH:

SUPERMARKET



DON'T LEARN FULL RANGE OF SKILLS
NOT TAUGHT TO RUN A SHOP
NOT SEEN AS "PROPER" BUTCHERS BY
RETAIL INDEPENDENTS

INDEPENDENT BUTCHERS

TRADESMAN

BLINKERED

FENCE SITTERS

RISK BEING EXPOSED TO OUT-DATED MIND-SET
GREATER POTENTIAL FOR BAD-HABITS AND
PRACTICES TO BE SEEN AS NORM

PROFESSIONAL BUTCHERS

STRIVERS

FOCUSSED

THOUGH NO GUARANTEE HOPEFULLY A
CHANCE TO BE EXPOSED TO A MORE
OPEN, PROGRESSIVE & PROFESSIONAL
MIND-SET

"They wouldn't allow an electrician to come out half trained and say he is. Why do we let it happen?"

CONTINUING TO ALLOW SUCH DIFFERENT STANDARDS OF LEARNING TO LEAD TO THE SAME QUALIFICATION WILL SIGNIFICANTLY UNDERMINE THE FUTURE OF THE INDUSTRY AND MUST BE ADDRESSED



“COLES AND WOOLIES WANT TO KILL OFF THE INDUSTRY AND THIS IS ONE WAY THEY ARE DOING IT”

A STRONG FEELING THAT ALLOWING THIS SITUATION IS PLAYING INTO THE HANDS OF THE BIG SUPERMARKETS

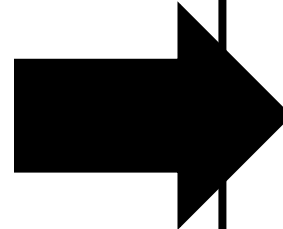
TO CREATE A GENERATION OF BUTCHERS WHO CANNOT WORK IN THE INDEPENDENT RETAIL INDUSTRY

THUS HELPING STARVE THE INDEPENDENT RETAILER OF NEW WORKERS MAKING IT HARDER FOR THEM TO COMPETE

AND THAT BY ALLOWING THIS TO HAPPEN RELEVANT INDUSTRY BODIES ARE TOO WEAK OR TOO BEHOLDEN TO THE SUPERMARKETS

THIS CREATES UNEASE AND CONCERN FOR THE FUTURE

NOBODY IS FIGHTING FOR THEM - IF THE SUPERMARKETS CAN GET THEIR OWN WAY HERE THEN WHERE NEXT



“I don’t believe in the skillsets of those supermarket butchers and they don’t wanna deal with customers that’s why they are there” Supplier

“The supermarkets want to split the trade. But you can’t have butcher A and butcher B with two different skill sets” sup

“There’s a gap between an apprenticeship in a retail shop and a supermarket. But they get the same qualification at the end. But if that retailer offers that guy who worked in a supermarket a job he’s got to spend 6 months training you up at a full rate!”

“Supermarkets shouldn’t be allowed to take apprentices. They should only be trained in retail shops and then everyone would come out at a retail butcher level. Then if they want to go into a supermarket that’s fine.”



IS DESPERATION FOR APPRENTICES LEADING TO POOR BUTCHERS OF THE FUTURE?

THE INDUSTRY IS TOUGH – WE KNOW THIS

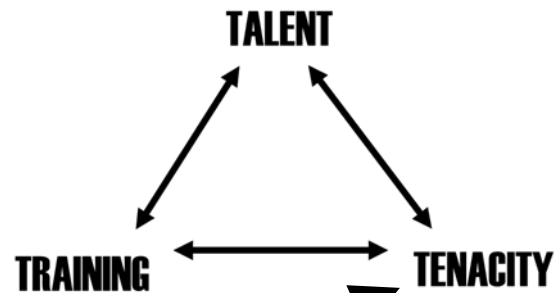
AND WE HAVE ALREADY DISCUSSED THAT A LACK OF PASSION FOR IT MAKES SURVIVAL DIFFICULT

YOU CAN'T TRAIN PASSION

THIS POSES THE QUESTION SHOULD STOP RECRUITING JUST ANY OLD KID AS SEEMS TO BE THE CASE NOW?

THE KIDS WHO MAKE IT THROUGH THEIR APPRENTICESHIPS SOMETIMES DEVELOP INTO GREAT BUTCHERS

BUT SOMETIMES THEY DEVELOP INTO AN UNINSPIRED DRIFTER BUTCHERS WHO SHIFT FROM SHOP TO SHOP ONLY STAYING FOR AS LONG AS THEY CAN STICK IT OR THE BOSS THEM



“I got sent twelve for a trial. Twelve. My staff didn’t want them in but I made it happen. Anyway, once they all realised that they could still get their dole if they called in sick that’s what happened”

“I got this kid downstairs. He’s being doing the same job for years. Every day, same things. And every day he comes to me and says ‘what do you want me to do today’ and everyday I have to get a bit of paper and write him a list. Every, single, day”

“You get some and they just fall out for whatever reason. Lose the plot, get pissed off. They leave, go somewhere else. Same thing happens there. They come back. I put them on again., 3 or 6 months later same thing again. Off they go. I’ve got some down there who it’s their third time with me”



A LARGE DISPARITY OF TRAINING STANDARDS BETWEEN BUTCHERS POTENTIALLY EXISTS



MIGHT LEARN GREAT BUTCHERY SKILLS BUT MIGHT NOT LEARN MODERN APPROACHES/BROADER SKILLS NEEDED TODAY

AT WORST COULD PICK UP NEGATIVE ATTITUDES AND BAD HABITS

MORE LIKELY TO ENTER THE TRADE UNDERSTANDING IT'S MORE THAN JUST CUTTING UP MEAT THAT CONTRIBUTES TO SUCCESS

“Once I’ve done my apprenticeship I’m going to do a business course part time at uni so in future when I own my own shop or something I’m ready and know what I’m doing. Plus it’ll save me having to pay someone else to do it”

AS THEY ENTER THE PROFESSION THIS INCONSISTENCY WILL FUEL FUTURE STAFFING ISSUES AND UNDERMINE THE INDUSTRY



A LARGE DISPARITY OF TRAINING STANDARDS BETWEEN BUTCHERS POTENTIALLY EXISTS

THIS MEANS MOTIVATED APPRENTICES MIGHT HAVE TO MOVE TO GET THE RIGHT APPRENTICESHIP

OR SIMPLY LEAVE THE INDUSTRY

WITH TALENT THIN ON THE GROUND AS IT IS THIS IS OBVIOUSLY A POTENTIAL LEAKAGE POINT FOR THE INDUSTRY



TWO OF THE HIGHER PERFORMING APPRENTICES SPOKEN TO HAD TO MOVE TO GET A LEVEL AND QUALITY OF TRAINING THEY FELT THEY DESERVED

“Yeah I was at this place and it was lots of cartons and I wasn’t learning a whole heap and I wasn’t getting on with the manager...so I quit and came here and it’s brilliant” Apprentice

“I was at a place a whole year. A whole year and they taught me nothing, showed me nothing. I had to quit and find someone else” Apprentice

THE INDUSTRY IS POTENTIALLY LOSING GOOD QUALITY CANDIDATES WITH POOR LEVELS OF IN-HOUSE TRAINING



THERE IS LITTLE GUIDANCE AND SUPPORT FOR APPRENTICES

ALTHOUGH A SMALL SAMPLE THERE ARE SIGNS THERE COULD BE A LACK OF PROPER GUIDANCE AND SUPPORT FOR APPRENTICE BUTCHERS

IF SUPPORT IS OUT THERE DO THEY KNOW ABOUT IT?



"I had no idea where I was really meant to be skill wise. Was I doing OK? I had no idea. And there didn't seem to be a way to find out?"

"When I had problems with bullying I looked around for some kind of help or resource but there wasn't really anything for butchers. Eventually I found a general counselling service but I had to find it myself"

APPRENTICES ARE SUBJECT TO ABUSE AND BULLYING

THIS HAS TO STOP

IT IS NO WONDER APPRENTICES WALK OUT OF APPRENTICESHIPS AND THERE IS AN UNDERCLASS OF BAD BUTCHERS IN THE WORKFORCE

THIS NEXT GENERATION OF APPRENTICES WILL BE KEY TO THE SURVIVAL OF THE INDUSTRY

OUT-MODED ATTITUDES TO APPRENTICES HAVE TO BE STAMPED OUT



"It was really hard. Really hard. I looked for support but there wasn't much out there. Did I think about quitting? F&k yeah! Loads of times. It was really really bad"* Apprentice

"That's why we like to train apprentices we like to bring new blood in...but some of the older butchers we've had treat them like crap and I'd say 'don't treat them like that' and they'd say 'well that's how I was treated, it's my right' and I'd say 'no it's not you should treat them how you'd want to be treated and if you can't there's no job'" Butcher





CABASSI & CO.
ARTISAN BUTCHERS

**COME IN
AND LEARN
HOW TO BE
THE HERO
AT HOME
TONIGHT**

THE FUTURE?



THE FUTURE - WHAT DID OUR SAMPLE EXPECT TO HAPPEN?

TRADESMAN

BLINKERED



FENCE SITTERS



PROFESSIONAL BUTCHERS

STRIVERS



FOCUSSED



BLINKERED ARE GONE
INABILITY TO LISTEN
UNWILLING TO ACCEPT CHANGE
UNWILLINGNESS TO TRY

FENCE SITTERS WHO DIDN'T REACT GONE TOO
THE LONGER THEY REMAIN INACTIVE THE
GREATER NUMBER COULD BE

A SMALLER, BUSINESS SAVVY BUNCH OF
BUTCHERS WILL EMERGE

THEY WILL MOST LIKELY OFFER A PREMIUM SERVICE
THAT DIFFERENTIATES FROM SUPERMARKETS

A STEADY DECLINE WILL CONTINUE

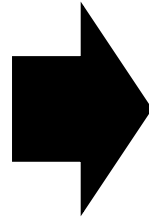


A SMALLER CADRE OF HIGH PERFORMERS WILL EMERGE

THOSE WILLING AND ABLE TO ACCEPT THAT THEY MUST ADAPT TO SURVIVE

BUT NOT JUST SURVIVE — THRIVE

SOME WILL CONTINUE TO DO VERY WELL AND SOME WILL PUSH THE INDUSTRY FORWARD



PROFESSIONAL BUTCHERS

STRIVERS

KEEP CALM
AND
KEEP TRYING

FOCUSSED

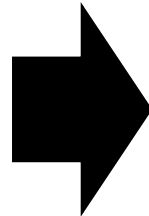


THE FUTURE ISN'T ABOUT EVERYONE BECOMING A GOURMET BUTCHER

IT'S ABOUT STEPPING UP THE OFFER

ADDING THE NEXT LEVEL OF PROFESSIONALISM

EXPLORING A RANGE OF APPROACHES TO THE BUSINESS THAT WILL CREATE SUSTAINED SUCCESS IN THIS COMPETITIVE MARKET



WITH MORE FOCUS ON:

EXPERIENCE OF SHOPPING — CREATE JOY AND AWE

COOKING - MANY WILL HAVE THEIR OWN CHEF

QUALITY READY MEALS - TO CATER FOR BUSY CONSUMERS/COMBAT TAKE AWAYS

LINES BEYOND MEATS - STOCKS, FISH, VEG, PASTRIES, CONDIMENTS, PASTA

"I look at it this way. Say they only have \$50 for meat a week. And I get a chunk of that, fine. But what about the other \$50 bucks they were going to spend elsewhere? What if I can get some of that too?"



WHAT APPROACHES WILL THEY USE?

THEY UNDERSTAND BRAND AND VISUAL IDENTITY

THEY WORK THIS ACROSS AS MANY TOUCH POINTS AND PRODUCTS AS THEY CAN

THEY WILL USE OTHER BRANDS WHERE THEY SEE A BENEFIT

“The good operators now, and the MLA has helped here, are working under brands, lots of brands e.g. this is a Cape Grim from Tasmania. The biggest advantage an independent butcher has is being able to talk to people and tell them about the product”



More than your local butcher



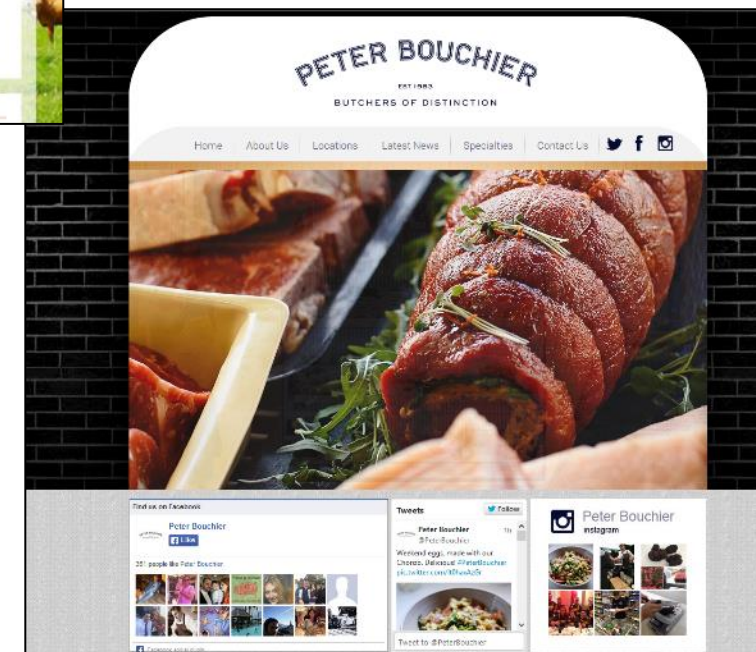
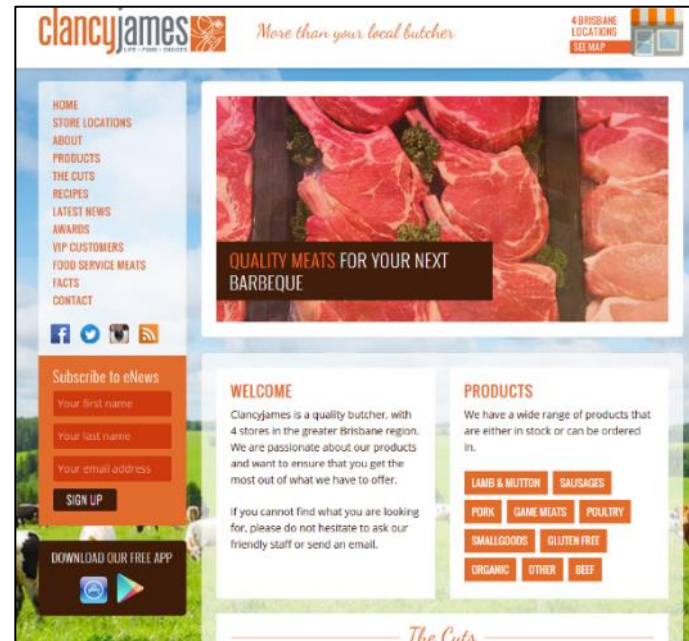
THEY UNDERSTAND THE IMPORTANCE OF ONLINE

NOT ONLY TO PROJECT THEIR BRAND BUT ALSO TO CREATE LOYALTY

A WEB PRESENCE IS KEY AND CONVERTING SURFERS INTO VISITORS, VISITORS INTO CUSTOMERS AND CUSTOMERS INTO SPOKESPEOPLE

A GOOD SITE WILL GENERATE OFFLINE CHATTER AND ONLINE THEY WILL SHARE YOUR CONTENT

TOP BUTCHERS ARE MAINTAINING GOOD WEBSITES AND SOCIAL MEDIA PLATFORMS



THEY UNDERSTAND THE SHOP MUST BE AN EXPERIENCE

WITH A PROPORTION OF CONSUMERS SEEING FOOD AS ENTERTAINMENT, A PASSION AND A HOBBY AS MUCH AS SUSTENANCE THEY ARE LOOKING FOR EXCITEMENT



IF IT'S GOOD ENOUGH FOR APPLE...



WHY NOT CABASSI & CO

GOOD BUTCHERS KNOW THEY NEED TO ADD JOY AND AWE



LA MACELLERIA



VICTOR CHURCHILL



THEY MAKE AN EFFORT TO REALLY UNDERSTAND THEIR CUSTOMER

THEY TRY TO SEE THINGS FROM THE CONSUMERS POINT OF VIEW

THEY TAKE A WALK FROM DOWN THE STREET TO THEIR SHOP OR THROUGH THE CENTRE LOOKING AT SIGNAGE, LIGHTING, BRANDING, DISPLAYS

THEY SCRUTINISE THE OTHER SIDE OF THE COUNTER — HOW DOES IT LOOK FROM THE CUSTOMERS STAND POINT? IS IT INVITING? CLEAN? EASY TO NAVIGATE? APPROACHABLE? ETC

THEY THINK ABOUT THE MINDSET OF PEOPLE COMING IN — ARE THEY A RUSHED MUM WHO NEEDS TO BE MADE A HERO OR A YOUNG YUPPY LOOKING FOR A WOW FACTOR?



“When I bought the shop the old owner had a real personality you know. And he told me about the customers and what they wanted but I waited 6 months. Just studied them, tried to work them out. And then once I'd done that I started doing some of the things I thought would work for them”



THEY KNOW HOW TO TELL A STORY

BEING ABLE TO TELL A STORY WORKS POWERFULLY

A BUTCHERS ABILITY TO COMMUNICATE HIS STORY DIRECTLY TO CUSTOMER PROVIDES A POINT OF DIFFERENCE TO THE SUPERMARKETS

IT PROVIDES HISTORY, HELPS ATTACH PERSONALITY TO THE BRAND AND ALLOWS THE CUSTOMERS TO EMPATHISE — IT A CHANCE TO LET PEOPLE KNOW WHAT YOU STAND FOR

A PRODUCT PROVENANCE STORY NOT ONLY REASSURES NERVOUS CONSUMERS ABOUT ANIMAL CARE ISSUES IT ALSO ENTHUSES AND EXCITES THEM ABOUT THE PRODUCT AND IT'S ULTIMATE DELIVERY

GOOD BUTCHERS WILL DRIVE HOME THIS STORY:

THEY CREATE AN ENVIRONMENT WHERE THE CONSUMER CAN'T FAIL TO EXPERIENCE IT

VISUALLY WITH POSTERS, DISPLAYS, POS MATERIALS AND STORE FIT OUT

VERBALLY - THEY DO NOT WAIT TO BE ASKED

THOSE WITH SALES ONLY STAFF WILL TRAIN THEM TO UNDERSTAND THE PRODUCT AND KEY SELLING POINTS



"I thought right, I need to do something about this so I did a full page ad in the local paper that made it clear that my meat was an always had been HGP free. And we gave all the details of where it was from and everything"



THEY PROVIDE MEALS SOLUTIONS, ADVICE AND INSPIRATION

THEY UNDERSTAND THAT CONSUMERS MIGHT BE RUSHED OR HAVE PUT NO PLANNING INTO DINNER

“Now they don’t buy a big bag of meat for the week they just run in for a smaller portion or a meal solution” Supplier

“My job as a butcher? It’s about supplying what they need. I’m always trying to work out what they will need”

SO THEY PROVIDE SOLUTIONS

GIVE COOKING TIMES TO DRIVE SIMPLICITY AND CONSIDERATION

PRE-PACK FOR EASE AND TO DEAL WITH WEIGHTS AND MEASURE RELATED DECISION ISSUES



'GOURMET' WON'T WORK FOR EVERYONE

ALTHOUGH IN DISCUSSING SOME OF THESE APPROACHES I HAVE USED IMAGES FROM HIGH END GOURMET BUTCHERS THERE IS NO SUGGESTION THAT ALL BUTCHERS NEED TO BECOME HIGH END

IT'S NOT ABOUT THAT — IT'S ABOUT ALL BUTCHERS RAISING THEIR GAME

WORKING OUT WHAT ELEMENTS AND APPROACH WILL WORK WITH THEIR DEMOGRAPHIC — SOME THINGS WON'T WORK BUT DOING NOTHING DEFINITELY WON'T EITHER

IT IS CLEAR THAT THESE APPROACHES ARE WORKING VERY WELL FOR A GOOD NUMBER OF BUTCHERS

AS EACH BUTCHERS DEMOGRAPHIC IS DIFFERENT THEY WILL NEED TO EXPLORE AND ADJUST THEIR APPROACH

AND THESE APPROACHES ARE WORKING SO WELL THAT THEY ARE NOW BEING MIMICKED BY COLES IN SOME OF THEIR CONCEPT STORES — I.E. DRY AGING ROOMS HAVE BEEN ADDED TO A NUMBER OF COLES IN THE LAST YEAR — IF THAT'S NOT ABOUT AWE AND JOY IN A COLES I DON'T KNOW WHAT IS





DISCUSSION & RECOMMENDATIONS



SOMEONE MUST CHAMPION THE INDEPENDENT BUTCHER

DESPITE THEIR PRICKLY NATURE AT TIMES AND SELF SUFFICIENT BRAVADO BUTCHERS DO WANT TO BE CHAMPIONED, RESPECTED AGAIN AND SEEN MORE AS TRUE ARTISANS (IN SOME CASES)

AND WITHOUT THEM THE STRANGLEHOLD OF THE SUPERMARKETS WILL ONLY GROW

“If there is no retailer we’ll get our pants pulled down by the supermarkets”

SO SOMEONE STEPPING UP TO THE PLATE TO HELP FEELS MORE LIKE A DISCUSSION ABOUT HOW THAN WHEN

APL HAS HAD A GO AT SUPPORTING THEM WITH THE BUTCHERS BATTLE PLAN

BUT IT MUST GO BEYOND THIS DIRECT HELP

THE BUTCHERS STATUS MUST BE RAISED IN THE SAME WAY CHEFS HAVE BEEN ELEVATED

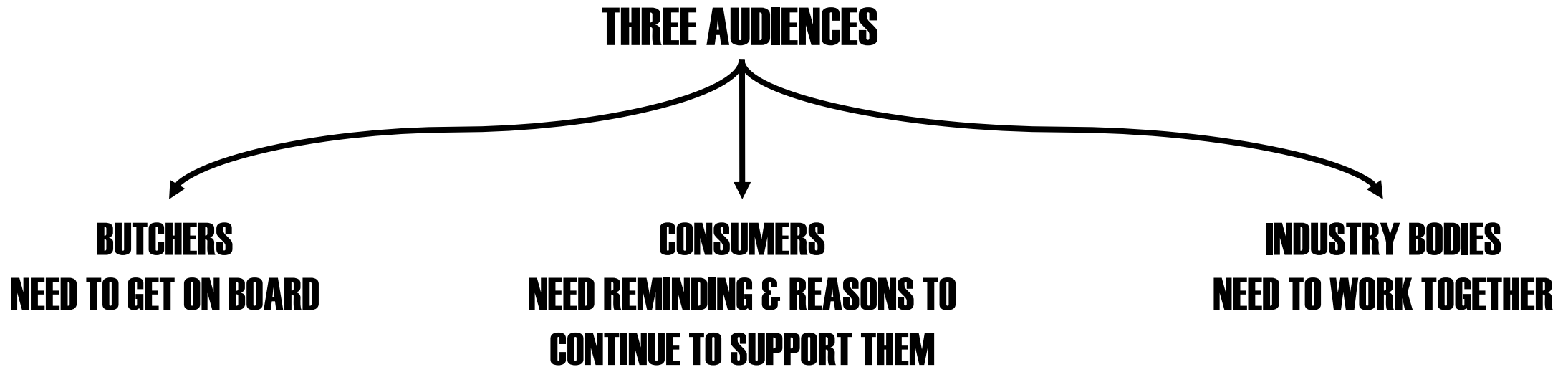
AND IT FEELS LIKE A LARGE ONGOING TASK - EVERYONE NEEDS TO BE INVOLVED

“Between MLA and AMIC there’s a few programmes around to help people but it’s the same old story to get the help you’ve got to accept the help and unfortunately the ones that don’t think they need the help are the ones that will drop off”

“It’d be great if the MLA would come to the table and we could look at all the things that need doing and decide who does what that would make us [AMIC] closer”



FIXING THE PROBLEMS WITH THE INDEPENDENT BUTCHER IS A MULTI TARGET JOB



**BECAUSE THE LOSS OF THE INDEPENDENT BUTCHER WOULD BE
CATASTROPHIC FOR ALL**



TRADESMAN

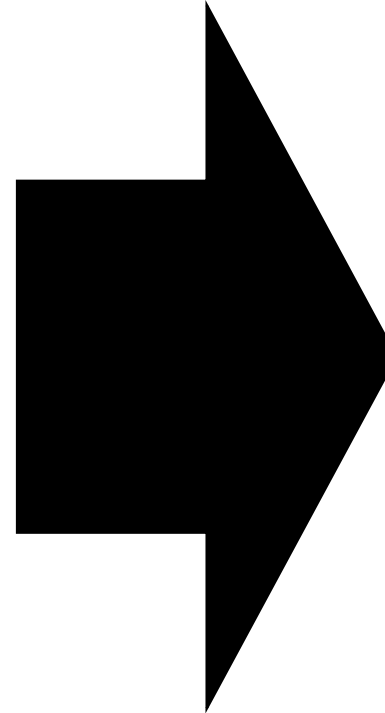
BLINKERED



FENCE SITTERS



DON'T WANT TO CHANGE
DON'T WANT TO TAKE A RISK
DON'T WANT TO LISTEN TO ANYONE!
INSULAR/DIVISIVE
SEE OTHER BUTCHERS AS COMPETITION
“GUT FEEL”
REACTIVE BUSINESS DECISIONS (TOO LATE)
LOW MORALE — FEAR DRIVEN
LESS LIKELY TO UTILISE TECHNOLOGY
STAGNATING



PROFESSIONAL BUTCHERS

STRIVERS



FOCUSSED



UNDERSTAND THAT ADAPTING IS ESSENTIAL
WILLING TO TAKE A (CALCULATED) RISK
LISTEN TO THE CONSUMER & OTHER BUTCHERS
COLLABORATIVE
SEE BUTCHERS AS THEIR ALLIES — EVERYONE ELSE IS COMPETITION
FORECASTING AND ANALYSIS
PROACTIVE BUSINESS DECISIONS
HIGHER MORALE — OPTIMISTIC
MORE LIKELY TO UTILISE TECHNOLOGY
INNOVATING

A SHIFT NEEDS TO OCCUR WITHIN THE INDUSTRY — A GREATER LEVEL OF PROFESSIONALISM NEEDS TO BE ADOPTED AT ALL LEVELS. IT WILL BE A HARD SLOG AT TIMES THERE'S NO DOUBT

THE ROLES AND FUNCTIONS OF THE MLA AND AMIC ARE UNCLEAR FOR SOME BUTCHERS

ARE THEY THE SAME BODY?

WHO REALLY DOES WHAT?

WHO IS RESPONSIBLE FOR WHAT?



IN TRUTH THIS MIGHT PART BE THEIR OWN LACK OF ENGAGEMENT BUT IT FEELS THERE IS WORK TO BE DONE HERE TO STRAIGHTEN THINGS OUT

"I think there's an issue about where the MLA starts and stops and where AMIC does"

RECOMMENDATION: A SIMPLE, JOINT, PIECE OF COMMUNICATION TO EXPLAIN THE ROLES, FUNCTIONS & SERVICES OFFERED IS NEEDED TO LET THE BUTCHERS KNOW WHAT AID IS THERE NOW & MOVING FORWARD AND FROM WHO



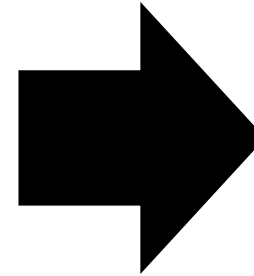
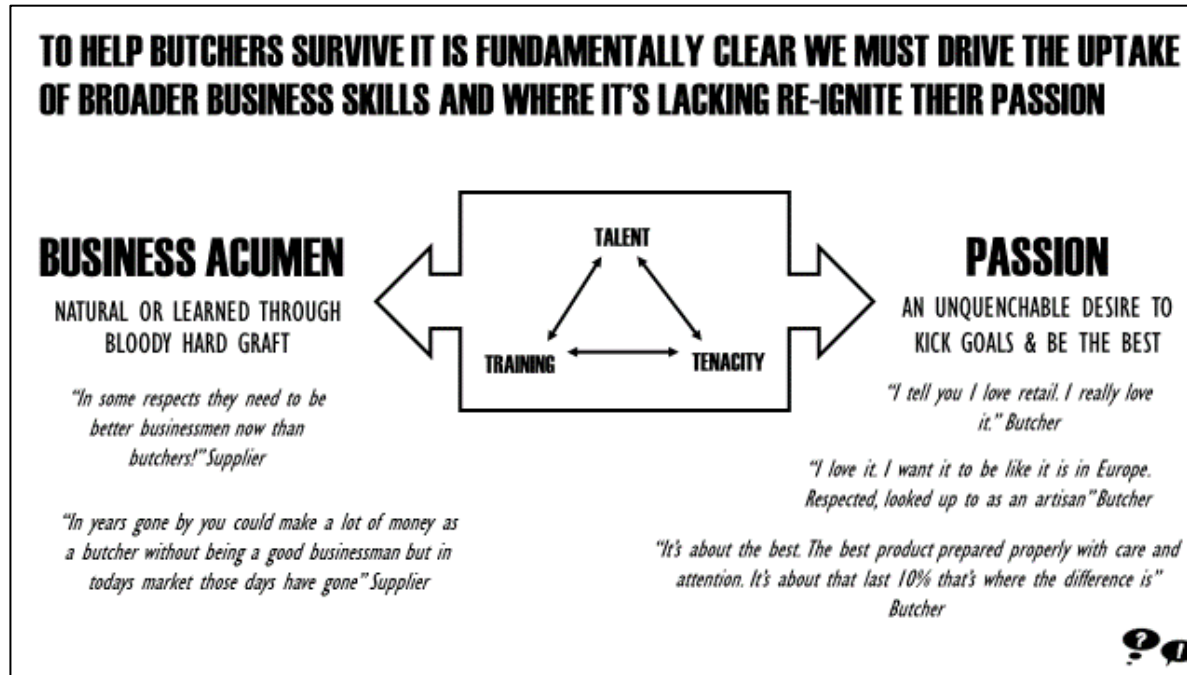
MSA AND ABG TWO KEY FACTORS EFFECTING THE PERCEPTION OF THE MLA FOR MANY BUTCHERS



BALANCING HOW THESE TWO PROPERTIES ARE DEVELOPED WILL PLAY A LARGE ROLE IN SHAPING THE PERCEPTION OF, AND ENGAGEMENT WITH, THE MLA FOR MANY INDEPENDENT BUTCHERS



THE ABG COULD BE A GREAT AVENUE TO ADDRESS THE PRESENT SKILLS AND CONFIDENCE CRISIS



THE SUCCESS OF THE ABG RE-BRANDING CAN BE BUILT UPON TO HELP INCREASE THE ENGAGEMENT WITH AND RELEVANCE OF THE MLA FOR MANY BUTCHERS

**IT CAN BE USED AS A TOOL TO GENERATE ENGAGEMENT, SPIRIT, COLLABORATION AND EDUCATION
IT COULD FORM THE BANNER UNDER WHICH THOSE WHO WANT TO DO SOMETHING CAN RALLY**



CREATION OF RESOURCES TO EDUCATE BUTCHERS WILL BE NEEDED

FROM THE BOTTOM UP THEY NEED HELP

UNDERSTANDING BASICS ABOUT BRAND AND POD, STORY, VISUAL MERCHANDISING AND DISPLAY, CUSTOMER SERVICE, COOKING ETC ETC - KEEP IT SIMPLE AND ACCESSIBLE

AS THERE ARE OBVIOUS EGO ISSUES HERE CONSIDER MATERIALS THAT BUTCHERS CAN ACCESS IN PRIVATE

FACTS SHEETS

A BOOK/FOLDER

AN ONLINE HUB

BUT DO ALSO USE NETWORKING AND ABG EVENTS TO HOLD SEMINARS ON KEY AREAS OF IMPORTANCE

TO HELP DRIVE CAMARADERIE AND RAISE MORALE

TO CHAMPION BUTCHERS WHO ARE DOING WELL



REVISIT THE MSA

RIGHT OR WRONG BUTCHERS HAVE ISSUES HERE THAT NEED ADDRESSING
THE SYSTEM SHOULD BE INTERROGATED

IS IT DELIVERING WHAT IT IS MEANT TO?

HOW CAN WE BRING BUTCHERS BACK ON BOARD?

WOULD A BROADER RATINGS SYSTEM BE USED TO ALLOW BUTCHERS TO DIFFERENTIATE
DIFFERENT CLASSES OF MEAT? REMEMBER BUTCHERS DON'T WANT TO USE SOMETHING
THE SUPERMARKETS HAVE...

ARE TOO MANY POORER ANIMALS DRAGGING THE SYSTEM DOWN?

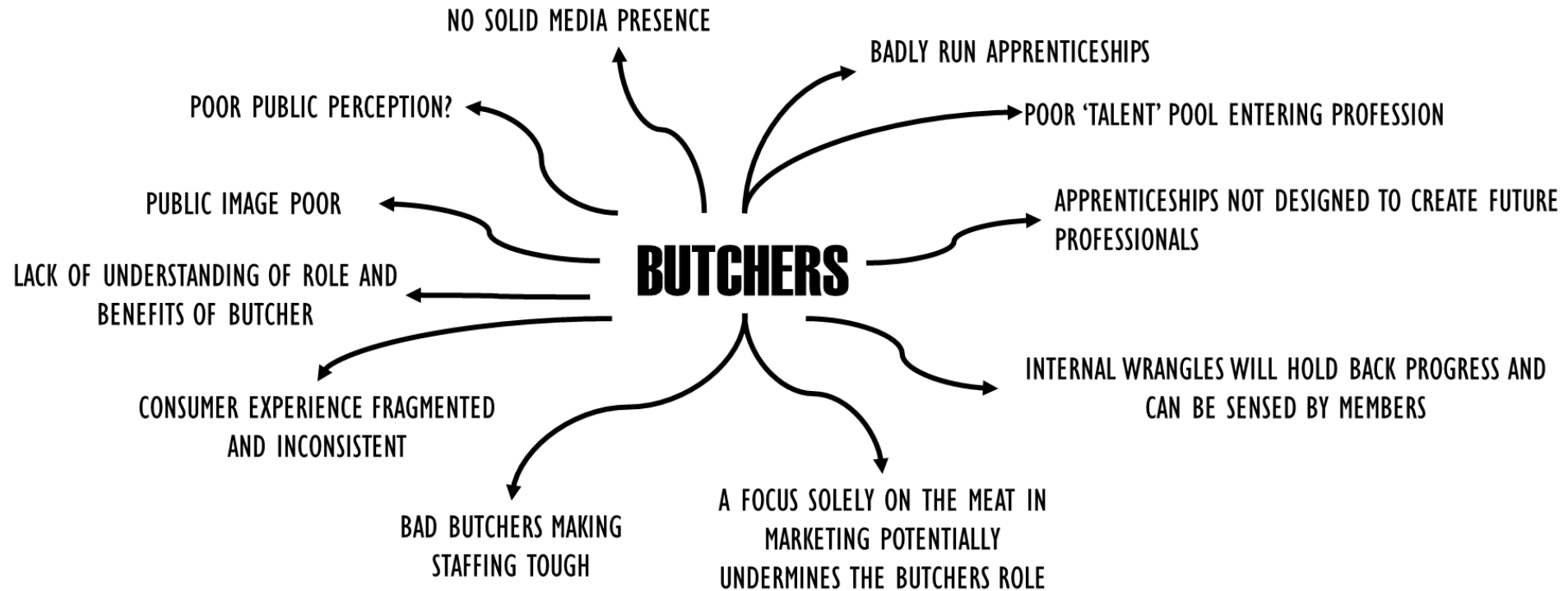
WHAT IS IT'S TRUE ROLE AND PERCEPTION WITH THE CONSUMER?

**AND, WHATEVER THE OUTCOME OF EXPLORING THE ISSUES AROUND MSA IT FEELS
LIKE SOME KIND OF 'SETTING THE RECORD STRAIGHT' LETTER OR COMMUNICATION
TO BUTCHERS IS PERHAPS NEEDED BECAUSE AT PRESENT THERE ARE MULTIPLE
TRUTHS AND HALF TRUTHS FLYING AROUND ABOUT THE SYSTEM**



A ROT HAS BEGUN TO TAKE HOLD WITHIN THE BUTCHERS 'BRAND'

ON MULTIPLE LEVELS THE OVERALL BRAND OF THE BUTCHER, WHAT IT MEANS TO BE A BUTCHER, WHAT BUTCHERS THINK OF THEMSELVES AND EACH OTHER AND WHAT THE CONSUMER THINKS OF THEM IS IN A POOR STATE



IF STEPS ARE NOT TAKEN TO ADDRESS THIS THE PROFESSION WILL GRADUALLY DWINDLE INTO A NICHE/ARTISAN PROFESSION (C.F. COBBLERS)



THE BRAND NEEDS TO BE REPAIRED BOTH INTERNALLY AND EXTERNALLY

EXTERNALLY

THE PROFILE NEEDS TO IMPROVE

BUTCHERS NEED A MEDIA PRESENCE/VOICE

ALL BUTCHERS NEED TO LOOK AT THEIR OFFER FROM A CONSUMER POV

WE NEED TO ATTRACT MOTIVATED APPRENTICES

INTERNALLY

UP STANDARDS ACROSS THE BOARD

ROOT OUT THE BAD BUTCHERS

FIX THE DEBACLE OF APPRENTICESHIPS

CREATE CAMARADERIE / BRING PEOPLE TOGETHER

THE BUTCHER

MULTIPLE BENEFITS

CREATE A POD FROM THE SUPERMARKETS

CONSUMER UNDERSTANDING OF THE ROLE AND BENEFITS

CREATE KUDOS AND RESPECT IN THE TRADE FROM A CONSUMER POV

RE-FRAME THE PROFESSION TO ENCOURAGE A NEW WAVE OF MOTIVATED AND PASSIONATE APPRENTICES

REINVIGORATE THOSE WITH LOW MORALE

REINVIGORATE APPRENTICES AND THOSE TRAINING THEM

CREATE A MORE POSITIVE COLLABORATIVE CULTURE



FIXING THE BRAND OF THE BUTCHER




EVERYBODY WANTS RESPECT BROUGHT BACK TO THE INDUSTRY

TO HELP ACCELERATE THIS THE MEDIA PROFILE OF THE BUTCHER NEEDS TO BE RAISED

CAN WE FIND MEDIA FRIENDLY BUTCHERS - OUR CURTIS STONE?

CAN WE PUT THE BUTCHER BACK IN THE SPOTLIGHT ALONGSIDE THE CHEFS TO RAISE THE KUDOS OF THE PROFESSION? I.E. WHY ISN'T THE TRI-NATIONS PACKAGED FOR TV?

ALSO CONSIDER ADDING 'BUTCHER BRAND' PERCEPTION QUESTIONS ETC BE ADDED TO MLA BRAND TRACKER



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'Chop Idol': BBC seeks next top butcher in Britain's Butcher of the Year

Forget singing, ballroom dancing and ice skating. The next big BBC talent nationwide search for... Britain's next top butcher.

By Neil Midgley, TV & Radio Editor
3:52PM GMT 13 Jan 2009

Comment

The programme will air on the corporation's youth TV channel, BBC Three, within the next few months. It will be called Britain's Young Butcher of the Year, although industry wags were yesterday suggesting alternative titles such as Chop Idol.

"It is a bit like Butcher Idol, I suppose," said Danny Cohen, controller of BBC Three, at the channel's season launch yesterday [Tues]. "What

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HELP SAVE THE BUTCHERS – BY PROTECTING AND NURTURING THE NEXT GENERATION

THIS IS NOT A QUICK FIX BUT IT NEEDS ADDRESSING

AND IT MIGHT BE A TREMENDOUS MULTI AGENCY POLITICAL HEADACHE BUT THE PRESENT SYSTEM OF APPRENTICESHIPS AND TRAINING IS BADLY FLAWED AND WILL ONLY WEAKEN THE INDUSTRY GOING FORWARD

THOUGHT STARTERS:

A THINK-TANK ON APPRENTICESHIPS — ALL INDUSTRY BODIES AND END USERS OF SCHEME INVOLVED

EXPLORE SETTING UP AN “APPRENTICES GUILD” TO HELP DRIVE THE UNDERSTANDING AND POSITIVITY OF A SHARED COMMUNITY & GIVE GUIDANCE AND SUPPORT

EXPLORE RECRUITING FROM ALLIED INDUSTRIES SUCH AS COOKS/CHEFS TO FIND MORE FOOD PASSIONATE APPRENTICES & THOSE WITH GREATER LIFE/TRANSFERABLE SKILLS

PRODUCE INFORMATION FOR BUTCHERS ABOUT ‘MILLENNIALS’, WORK/LIFE BALANCE AND HOW TO WORK SUCCESSFULLY WITH KIDS TODAY

CONSIDER A SCHEME TO RATIFY/ASSESS WHICH BUTCHERS CAPABLE OF GIVING QUALITY TRAINING — A BIG CALL BUT CONSIDER REFUSING TO ALLOW BAD BUTCHERS TO HAVE APPRENTICES!



PROVIDE WATCH OUT/PIT FALLS LISTS FOR SHOPPING CENTRES, LEASES AND NEW SHOPS

THIS FELT LIKE AN AREA WHERE SOME SPECIALIST HELP IS
REQUIRED

A CHECKLIST OR NEW BUSINESS STRATEGY PACK WITH ADVICE
AND WATCH OUTS WILL HELP

A CHECKLIST CAN'T GIVE BESPOKE ADVICE BUT IT WILL ACT TO
FLAG WARNING SIGNS AND MIGHT MAKE BUTCHERS THINK
TWICE BEFORE TAKING A BAD DECISION

*“I don't believe the industry bodies are giving the right level of support
to their members. If you look at the pharmacy guild their members get
all the information they need to work out if the business will make
money on a particular deal. But with a butchers you have to work it all
out yourself”*



GETTING THEM ALL ON BOARD?

WE KNOW BUTCHERS CAN BE BLOODY MINDED AND FIERCELY INDEPENDENT
BUT WE'RE AT A STAGE WHERE IF NOTHING IS DONE IT'LL BE TOO LATE
TO BRING ON BOARD THE FENCE SITTERS CONSIDER A PIECE OF COMMUNICATION ABOUT THE ISSUE
THERE ARE SEVERAL APPROACHES THAT COULD BE EXPLORED:

PROMPT SELF REFLECTION: "LAST YEAR XX BUTCHER CLOSED IN QLD — WILL YOU BE NEXT?"

OR

USE THE "IDENTIFIABLE VICTIM EFFECT" — TELL THE STORY OF A BUTCHER WHO DID NOTHING UNTIL IT WAS TOO LATE OR
MULTIPLE STORIES TO THE SAME EFFECT

OR

CREATE EGOCENTRIC BIAS — YOU ARE THE LAST OF THE FEW — LEADING TO: "I AM THE BUTCHER"

OR

ROMANTICISM — IT'S THE LAST OF THE OLD WAYS — UP TO THIS GENERATION TO TEACH THE NEXT BEFORE IT'S TOO LATE

A TOUGH TASK. BUT A TASK WORTH PURSUING

